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The Journal of the American Logistics Association
SUMMER 1985

Special Feature
4th Annual Exchange Sales Report

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- **Commissary Operations**
- **Candy & Snack Foods Marketing**

People Make The Difference

- DoD Rediscovers Families
- Computers Enter Exchanges
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Santa's Holiday Toy Box

Military exchanges rang up some $107 million in toy sales in FY84, increasing category sales by more than ten percent over FY83.

Here's a glimpse at what military exchange customers will be hunting for in this coming holiday selling season.

Coleco's Cabbage Patch Kids line won the "top licensed products" crown in 1984 for the third consecutive year. Pictured here are Cabbage Patch Twins, one of several line additions coming for 1985.
Photo courtesy Coleco Industries, Inc.

The most desired toys on Christmas lists this year are likely to be: Cabbage Patch Kids, Transformers and GoBots. Sound familiar? Those same toys led the industry to last year's record-breaking $12 billion sales performance, and toy manufacturers are eager to repeat their 1984 successes with more of the same.

"There's really not a whole lot that's new for Christmas 1985," says Frank Oliverio, a headquarters senior supervisory toy buyer for the Dallas-based Army and Air Force Exchange Service (AAFES).

"Line extensions" best describes the 1985 crop of Christmas toys, according to Barry Flayton, a headquarters toy buyer for the Staten Island, NY-based Navy Resale and Services Support Office (NAVRESSO). "If a toy did well last year, expect to see it back this year, with more items in the same line," he says.

But there's no lack of excitement about this year's selection of toys among the industry that makes them. According to Stephen G. Shank, chairman of the Toy Manufacturers of America and president of Tonka Corp., sales this year should show a healthy 15 percent increase over last year.

"Most indicators suggest a strong economy for 1985," Shank said at the American International Toy Fair in New York last February. In addition, "child demographic reports are in the toy industry's favor," he said.

"The birth rate is up 6.5 percent and about 43 percent of these are first births. The number of children under the age of five is expected to increase 7.6 percent until 1990; the number of children between the ages of five and nine should grow by 16.5 percent," he said.

What They'll Want

What those youthful voices will be clamoring for this Christmas will be Coleco's Cabbage Patch Twins and plush little ponies for them and the other Cabbage Patch Kids to ride. New Transformers by Hasbro will be disguised as dinosaurs and radios. And there's now a triple change model that switches from a tank into a plane and then a robot, plus a train that changes into a space shuttle and robot.

Tonka has added 28 new GoBots to its line, including a giant robot that can be pieced together from six individual GoBots.

BY MARGARET LEROUX

Margaret LeRoux is a Chapel Hill, NC-based freelance writer. She is a regular contributor to several leading trade and business publications and has extensive writing experience in retailing subjects.

The new Sectaurs line of action figures from Coleco is expected to have strong appeal. Children will find that their favorite furry insectoids double as hand puppets. Photo courtesy Coleco Industries, Inc.

"Collectibility is a big part of the appeal for kids' toys," says Al Carosi, vp-marketing for Hasbro Bradley. "Children like their little sets of figures, and the toy industry has responded with multiple characters."

Adds TMA's Shank, "...story lines created especially for the toy" contributed to the popularity of the industry's best selling toys last year.

Makers of action toys are following the example of Mattel's highly successful launch of He-Man and the Masters of the Universe. Introduced only four years ago, He-Man and his nemesis, Skeletor, spawned a supporting cast of best-selling characters and accessories.

Last Christmas season, Snake Mountain, the evil fortress of the arch villain Skeletor, was snatched off the shelves almost as fast as it was stocked.

"We knew Snake Mountain would be a monstrous seller," says AAFES's Oliverio. "We couldn't get enough of them to keep up with demand."

New Masters of the Universe characters this year include Roboto, a mechanical warrior with moving gears and jaw, Moss Man, master of camouflage, and Sy-Klone, a human, fist-flinging tornado.

New For Girls

For girls who are fans of He-Man, Mattel is introducing the Princess of Power collection. The line revolves around She-Ra, the long lost sister of He-Man. Like her brother, the most powerful woman in the universe also has a dual identity, Princess Adora.

She-Ra rides a pink horse who becomes a majestic unicorn when mask and wings are added. She lives in the Crystal Castle and has a jealous adversary, Catra. She-Ra is supported by five female allies and Bow, who has a special mechanism allowing his heart to beat for her.

All these new characters "make a buyer's job much more difficult," says NAVRESSO's Flayton. "You have to weed out," he notes, those toys that will be this season's wall flowers.

The weeding-out process begins at the American International Toy Fair. This year more than 15,000 buyers from the U.S. and 60 foreign countries fought their way through packed showrooms at the Toy Center in New York.

Most fair-goers, like the buyers for AAFES and NAVRESSO, were simply window shopping. Although AAFES and NAVRESSO buyers attend the Toy Fair, decisions on what toys will be sold at most military exchanges aren't made until after the show.

Tough Decisions

NAVRESSO's Flayton explains that Navy selection procedures involve buyers from several NAVRESSO field activities.

"We review the lines at the Toy Fair, then afterwards buyers from NAVRESSO field support offices and exchanges meet to review what we've seen and liked. We work out buying decisions together," he adds. "By the end of March, it's pretty much all settled."

Factors that go into the buyers' decisions to select a particular toy, Flayton says, include "the price, play value, educational benefits a child can derive from it, and safety factors."

"We look for the best value for the money," he says, "and determine whether the toy does what it's supposed to, be it to amuse or educate."

Adds Oliverio at AAFES, "Also important is the perceived value. Does the toy look like it's worth the price? Is the packaging attractive? Does it sell the toy?"

Among safety features considered are breakability, he says. In addition, "if a toy shoots projectiles, then we won't carry it."

As military parents increasingly price shop to stretch their budgets, military exchanges are finding themselves in heated competition with off-base discount toy outlets.

"We go out with a list of 150 to 200 toys that will be offered at prices competitive with discount stores," Flayton says. "We assign some as loss leaders," he continues, "but we can't sell every item as a loss leader."

Mattel's new Princess of Power collection will help to dramatically expand the fast-growing action figure category, and the Princess will also star in a new TV miniseries this fall. Photo Credit © Mattel, Inc. 1985

Other difficulties for exchanges are limited amounts of sales space available for toys, and a toy selling season that essentially covers only the fourth quarter. Some exchanges sell toys throughout the year, NAVRESSO's Flayton points out, but the majority "sell toys only at the Christmas season."

At AAFES, Oliverio says that toy sales don't begin in earnest at most exchanges until mid-September, when the "Four Seasons" shops are cleared out and reset, with lawn mowers replaced by toys.

Buying In Depth

Few exchanges are able to offer the range of toys available in chain stores like Toys R Us and Kay-Bee, Oliverio notes. "We've been successful in buying in depth, not width," he says. "We've been willing

Toy Trivia, Anyone?

What may evolve into a trivia-type game is an entertaining list of stories describing the origins of many well-known toys and their equally renowned manufacturers, produced by the Toy Manufacturers of America. A sampling of stories are reprinted here to see how much you know about the toy industry:

■ **To Boldly Play Where No Man Has Played Before!** Luke Skywalker had R2D2; E.T. hung around with a closet full of stuffed animals. If space is the final frontier, then it's only reasonable that American astronauts are allowed to take their favorite toys on a space mission. That's exactly what happened in February 1985 when the space shuttle Challenger's crew performed weightlessness experiments with toys on their five-day flight. Hailed as the least expensive scientific experiment NASA had ever conducted, the Challenger's astronauts played with a yo-yo, top, magnetic marbles, a small red car, a back-flipping mouse and a SLINKY. The playthings reportedly cost a total of $20 and will be "co-stars" in a movie that will film the astronauts at play to educate children about zero-gravity. Check a theater near you for show times! (NASA)

■ **"Whittle" While You Work.** Herb Schaper, a Minneapolis mailman in the late 1940s, used to whittle fishing lures while walking his route and discovered that one in the shape of a flea captivated the interest of children. In 1948, with $75 in investment capital and one product, COOTIE, he started Schaper Toys. He eventually expanded and developed a line of 40 toys and games. (Schaper Manufacturing Company)

■ **Lego Bricks Have Power To Hire/Fire!** LEGO bricks were employed for an exercise used to hire potential employees at New United Motors Manufacturing Inc., (Nummi), the joint venture of General Motors and Toyota in California. In Nummi's LEGO test, one applicant told another how to assemble a truck and the latter person carried out the instructions with the building bricks. The purpose was to test how well applicants worked together and to determine creativity as well as leadership abilities. (LEGO Systems & *New York Times*, 8/23/84)

■ **Like Father Like Son.** LINCOLN LOGS were invented in 1916 by John Lloyd Wright, son of architect Frank Lloyd Wright. John got his idea for the toy while in Tokyo with his father observing construction techniques for an "earthquake-proof" hotel. Today, LINCOLN LOGS are produced from about four train carloads per month of Ponderosa pine from National Forests in Oregon. (Playskool & the U.S. Department of Agriculture)

■ **If At First You Don't Succeed.** MONOPOLY was brought to Parker Brothers in 1933 by the late Charles B. Darrow, who developed the game while he was unemployed during the Depression. It was initially rejected as having "52 fundamental errors" but was later published by the company in 1935. The most exotic versions of MONOPOLY include the all chocolate set offered a few years ago by Neiman-Marcus and Dunhill's board inlaid with semi-precious stones, 14 karat gold and ebony worth $5,000. MONOPOLY celebrated its golden anniversary in 1985 and over 90 million Monopoly sets have been sold worldwide in its first 50 years. (Parker Brothers)

to buy fewer items, but at the same time offer complete lines of those items."

His strategy has apparently succeeded, as witnessed by 1984 AAFES worldwide sales of toys, hobby and craft merchandise leaping to $78.5 million, an 11.3 percent sales increase over 1983.

At NAVRESSO, Flayton reports 1984 toy sales of more than $25 million.

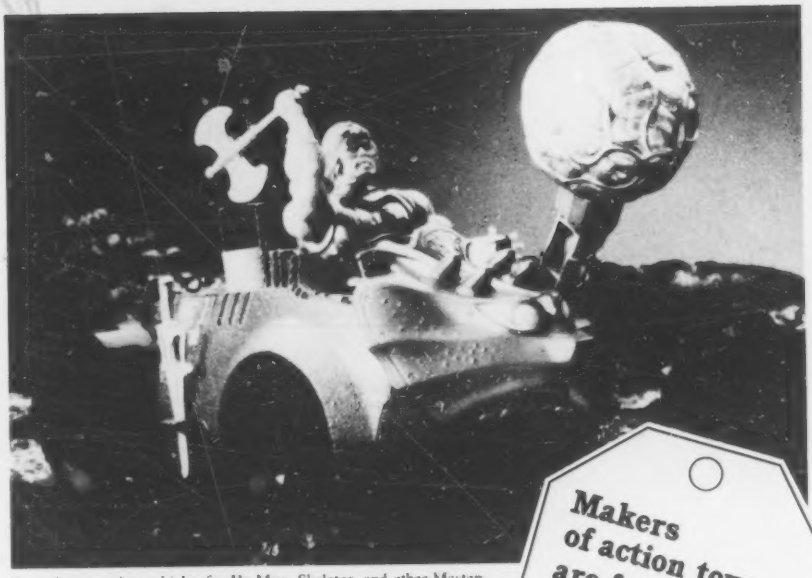
Notes Oliverio, "The trick is knowing what's going to be a hot item."

For 1985, that "hot item" may well be Wuzzles, plush figures that are a combination of two different animals. Wuzzles are a joint venture between Hasbro Bradley and Walt Disney Productions.

They have whimsical names like Hoppotomus, which is half bunny, half hippo; Bumblelion, a combination of bumblebee and lion; Eleroo, part elephant and kangaroo; and Rhinokey, part rhino and monkey.

Each Wuzzle comes with a 24-page book that tells a didactic story about each character, imparting values such as self-confidence, teamwork and sensitivity to others.

Buyers Oliverio and Flayton both predict Wuzzles to become big sellers this year and Hasbro's Carosi expects, "we'll have to struggle to keep up with the demand." The company says that advance licensing of Wuzzles property has exceeded that of any new character.



Several new action vehicles for He-Man, Skeletor, and other Masters of the Universe action figures from Mattel will adorn play area floors beginning later this year. Photo Credit: © Mattel, Inc. 1985

Makers of action toys are following the example of Mattel's highly successful launch of He-Man and the Masters of the Universe.

TV's Toy Stars

An important part of the marketing strategy for Wuzzles will be their introduction via a weekly tv show. It's a recent trend in the toy industry to introduce new lines not only in commercials, but to feature the toys as stars of their own shows. Several new series built around new characters are scheduled to start airing in the fall.

Since He-Man and Masters of the

■ **Around The World And Then Some!** Long before the printed word, the toy trademarked "yo-yo" had its origin as a primitive weapon in the Philippine Islands. It was fashioned from a sharp piece of flint-like rock with a long thong tied to it. If a native's aim was poor, at least he could retrieve his weapon and the hunting expedition wouldn't be a total loss.

During the 17th and 18th centuries, the yo-yo evolved into a favorite diversion in the royal courts of France and Spain. A painting of a nobleman holding his yo-yo hangs in the Louvre in Paris.

The toy finally emigrated to the United States in the late 1920s where it officially became known as the YO-YO. Today, playing with a YO-YO is a favorite pastime around the world and a national sport in the Philippines. (Flambeau Corporation/Duncan Toys)

■ **Italian Immigrant Develops First Electric Train Set.** The late Mario Caruso, an Italian immigrant, is credited with developing the original LIONEL electric train set. It is also said that Caruso took the primitive battery-powered "box on tracks" invented by Joshua Lionel Cowan and fashioned it into a realistic model train. (Fundimensions)

■ **The Mansion of Happiness is First American Board Game.** Invented in 1843 by a minister's daughter and published by W & S B Ives Company, the game reflected our Puritan roots. Dice were forbidden, banned as tools of the devil. The goal was for players to reach "eternal happiness." It was bought by Parker Brothers in 1880. (Parker Brothers)

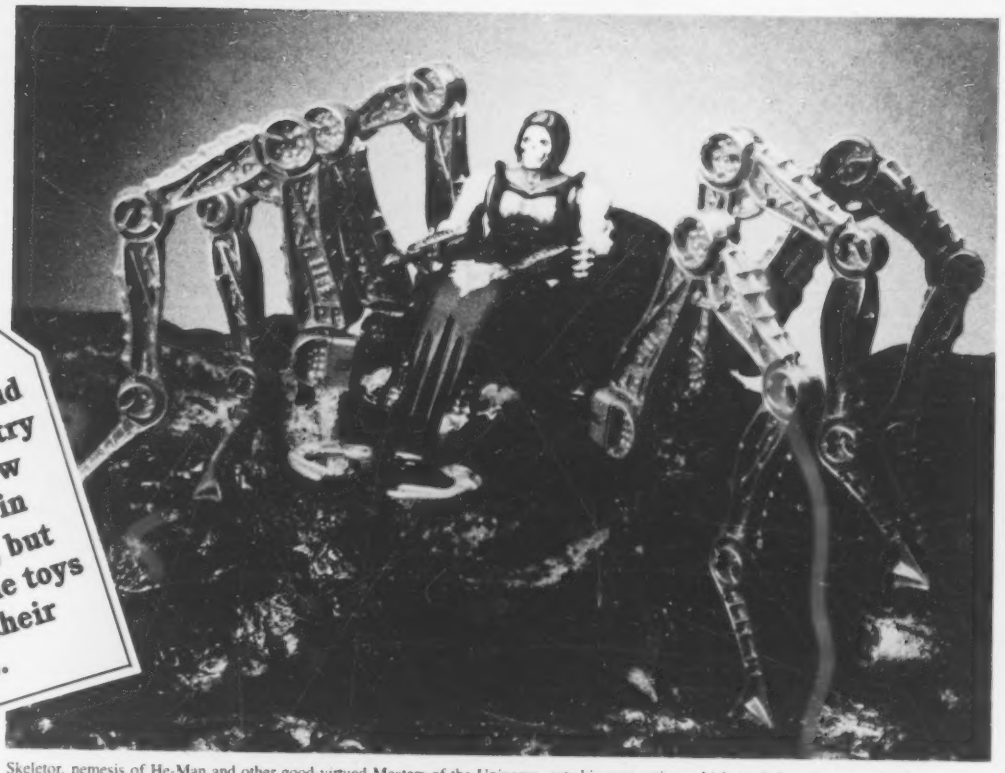
■ **"Great" Little Toymaker.** Tonka, originally known as Mound Metalcraft Company, was founded in the basement of a small schoolhouse in 1946. Its first two toy trucks featured a steam shovel and a crane. The company was later named Tonka Toys after Lake Minnetonka which dominated the scenery around the company's factory. The word "tonka" means great in Sioux. Since its humble beginning with two toys, Tonka now has a line of over 100 products, including the trend-setting GOBOTS. (Tonka Corporation)

■ **Playing His Card Right.** Robert Tezak, currently the Will County, Illinois coroner, started International Games in 1972 when he bought the rights to the card game, UNO, from its late inventor Merle Robbins, a Cincinnati barber. Operating from the back room of his family's florist shop, he parlayed UNO into the best selling card game in America. Since 1972, over 45 million UNO card games have been sold worldwide. (International Games)

■ **Sudsy Start.** Kenner Products was originally a soap manufacturer trying to compete with Procter & Gamble. To induce people to use the soaps, an in-box premium, The Bubble Gun, was created. The profits from the soap went down the drain but the gun, Kenner's first toy, was extremely successful! The company's most recent successes are STAR WARS, STRAWBERRY SHORTCAKE and CARE BEARS. (Kenner Products)

■ **Step Into My Office.** In 1908, Henry S. Winzeler sold his dental practice and began a novelty items company in a rented band hall with only eight employees. That company is Ohio Art and its most famous toy is ETCH-A-SKETCH. Since its introduction in 1960, over one million ETCH-A-SKETCH toys have been sold each and every year. (Ohio Art Company)

It's a recent trend in the toy industry to introduce new lines not only in commercials, but to feature the toys as stars of their own shows.



Skeletor, nemesis of He-Man and other good-virtued Masters of the Universe, gets his own action vehicle to help animate action figure playtime. Photo Credit: © Mattel, Inc. 1985

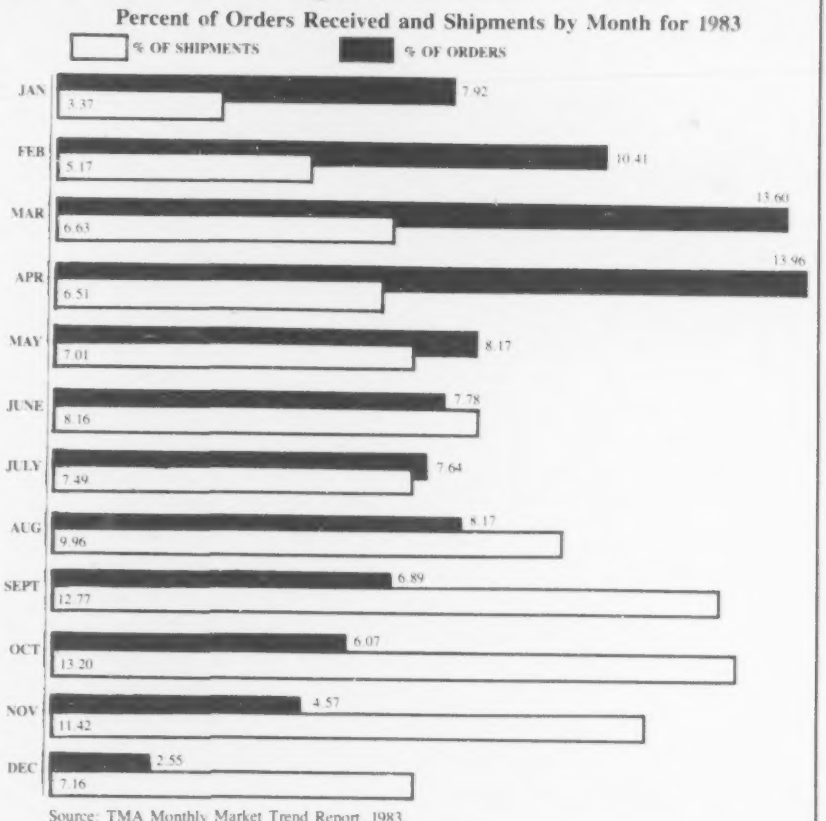
Distribution and Consumer Purchasing Patterns

According to the Toy Manufacturers of America, because many toys are bought by the public as Christmas presents, a disproportionate amount of overall retail sales, ranging up to 60% or more, occur in one concentrated selling season in the last quarter of the year. Toy manufacturers must therefore structure their production and distribution so that a sufficient amount of product can be available in retail stores during the Christmas selling season when there is little opportunity for merchants to reorder.

Though this pattern remains essentially unchanged, there are definite indications of a developing trend toward *greater* year-round toy sales. Retailers are increasingly interested in promoting toy sales on a year-round basis and are participating with manufacturers in such efforts.

Also, inflation and fuel shortages have contributed to the growth of at-home family entertainment items such as board, card, electronic and video games. This trend has helped increase year-round sales, and also to expand the industry's consumer age base to include older teens and adults as well as children.

The 1983 pattern, month by month, of orders received and products shipped by U.S. toymakers is:



Source: TMA Monthly Market Trend Report, 1983

Universe debuted on tv three years ago, action toy shows have leaped to the top of all childrens' "must see" lists.

This fall, for example, Princess of Power will have her own show, back to back with the popular He-Man show.

Transformers were introduced last fall with a mini-series, and they'll be back this September with a daily half-hour show. GoBots are the subject of an animated series by Hanna Barbera, with 60 new episodes slated for syndication in the fall.

Two new collections of action figures, Kenner's M.A.S.K. and Coleco's Sectaurs, will soon be on tv. M.A.S.K. will be featured in a mini-series early this summer and in 65 animated half-hour episodes this fall. Sectaurs will air as a mini-series in October.

Two new entries in Kenner's plush line will debut with tv movies and mini-series. They are Hug-a-Bunch, 18-inch plush dolls dressed in satiny outfits and accompanied by their own little doll called a Huglet. Hug-a-Bunch dolls also will star in a tv movie later this year.

Robot Man, a toy that combines the appeal of a robot with the cuddly aspects of a plush toy, will be featured on a mini-series.

A new daily half-hour animated show is being planned for GI Joe this fall. A favorite on military bases since its introduction in 1964, GI Joe has undergone a streamlining that makes him a formidable competitor in the action toys category.

The original GI Joe was an 11.5-inch figure, fully articulated with 21 moving parts and life-like hair. Within five years, the GI Joe line represented every branch of the U.S. Armed Forces as well as numerous foreign armed forces.

By 1978, however, the manufacturer "wasn't sure where to go with him," says Hasbro's Carosi, "so GI Joe was furloughed." He was reintroduced in 1982 in a 3.75-inch version with a line of action figures, weapons, uniforms and vehicles modeled after modern army designs of the 1980s.

This year there will be an array of new GI Joe figures and equipment ranging from enemy Dreadnok figures to a 7.5-foot long aircraft carrier, complete with working elevator, on-board vehicles, an electronic sound mechanism, radar room, computer room and munitions armory all furnished in authentic detail. It retails for about $120.

GI Joe "does very well in the military market," says Hasbro's Carosi, "though we don't promote him as a military toy. Today, he's more of a James Bond-type character, fighting Cobra, the mythical organization that's out to destroy the world. He better fits the fantasy play/action category."

Toy Industry Dollar[1] & Unit Shipments 1983 vs. 1984

(Estimated volumes in millions)

		Dollars			Units		
		1983	1984	% Change	1983	1984	% Change
I.	**Action Figures/ Dolls & Accessories**	$1,036	$2,316	+124%	311	468	+50%
	Robots	#	220		#	44	
	Action Figures	216	377		97	141	
	A.F. Accessories	160	245		26	29	
	Baby Dolls	160	512		17	31	
	Fashion Dolls	116	161		21	26	
	Mini Dolls	30*	84		10*	19	
	Other Dolls**	131	265		98	94	
	Baby Doll Access.	21	195		3	25	
	Fashion Doll Acess.	65	94		22	31	
	Other Doll Access.	23	38		8	10	
	Doll Houses/Furn.	114	125		9	18	
II.	**Games/Puzzles (Non-Electronic)**	$514	$1,043	+103%	172	212	+23%
	Children's Board Games	59	62		14	14	
	Other Board Games	142	598		29	59	
	Action/Skill Games-Children	31	74		11	14	
	Action/Skill Games-Adult/Family	56	36		5	4	
	Card Games	40	49		23	27	
	Puzzle Games	13	8		4	3	
	Strategy Games	35	49		15	12	
	Word Games	26	29		5	6	
	Other Non-Elec. Games	36	55		16	20	
	Cardboard Puzzles	56	60		42	45	
	Wood/Plastic Puzzles	20	23		8	8	
III.	**Totally Electronic Games**	$2,397	$1,094	−54%	93	67	−28%
	Electronic Learning Aids	67	113		4	6	
	Elec. Hand Held/Tabletop	170	51		7	3	
	TV Video Systems***	760	165		7	3	
	TV Video Software***	1400	765		75	55	
IV.	**Sports/Outdoor Toys**	$328	$419	+28%	59	67	+14%
	Playground Equipment	80	127		3	3	
	Wading Pools	51	69		4*	7	
	Foam Sports Toys	31	37		9	12	
	Water/Sand/Pool Toys	26	38		12	14	
	Other	140	148		31	31	
V.	**Riding Toys (Excl. Bicycles)**	$255	$285	+12%	21	19	−10%
	Plastic Tricycles	79	91		6	7	
	Metal Tricycles	34	26		2	1	
	Other Pedal Ride-Ons	25	21		2	1	
	Riding Sports	21	18		6	6	
	Other Riding Vehicles	96	129		5	4	
VI.	**Non-Riding Transportation**	$707	$789	+12%	298	239	−20%
	Battery Operated Vehicles	181	244		32	28	
	Mechanically Operated Veh.	80	56		18	14	
	Elec. Car/Truck Sets	34	37		1	1	
	Elec. Car/Truck Access.	12	15		2	2	
	Elec. Train Sets	31	41		1	1	
	Elec. Train Access.	25	24		3	3	

Continued on page 49

Transformers were a late retail entry in 1984, but strong sales pushed them on to become the best-selling new boys' toys of the year. New and even more unusual Transformers debut in 1985. Photo courtesy Hasbro Bradley

There's no lack of excitement about this year's selection of toys.

Action Toys Mean Action

You can expect a lot of action from the action toy category this Christmas season as major toy manufacturers fight for a share of that lucrative market. More than $2 billion in action toys were shipped last year, an increase of 124 percent over 1983.

The Transformer line of robots has been expanded to include insects, dinosaurs, triple changers, and small vehicles that combine to make one large robot.

The best-selling new toy of 1984, more than 10 million Transformers were sold between their retail introduction in late May and the end of the year.

Asked to explain the popularity of Transformers, Hasbro's Carosi says, "They're a combination of things kids like to play with, and making the conversion from toy to robot is something kids can do, but not many adults do successfully. The kids love the feeling they can do it themselves."

Tonka's competing GoBots will have new accessories, including Thruster, the headquarters for the evil Renegade GoBots, and Scales, a giant race car that turns into a robot monster.

In Kenner's new M.A.S.K. line, "the concept is illusion, where ordinary vehicles convert into extraordinary fighting machines and innocent-looking men are really super-sophisticated secret agents," says product manager Justo Nunez.

M.A.S.K. stands for Mobile Armored Strike Kommand, a team whose enemy is their former leader, and his evil force, V.E.N.O.M. (Vicious Evil Network of Mayhem).

The M.A.S.K. team comes with action vehicles that have a specific function related to their character. There's a tractor rig and off-road vehicle that conceals an armed hydroplane.

Coleco's new line of action figures is Sectaurs, survivors of a genetic experiment on the planet Symbion. They share thoughts and resemblance with insectoids, which they ride to fight the evil warriors of the Dark Domain. Unlike other action toys, children can place their hands inside the insectoids to control the action figures' movement.

Dargon is the heroic defender, astride Dragonflyer, whose large iridescent wings are battery operated. But like a hand puppet, the insect's jaws and legs are controlled by the child's hand inside. Dargon's archenemy is General Spidrax, who is paired with Spiderflyer, a furry insect.

Six other Sectaur figures and their companion insectoids make up the line.

Toy Sales Don't Play Around In Exchanges

The Army and Air Force Exchange Service (AAFES) reports a 1984 year-on sales increase of 11.3 percent for all toys, games and bicycles sold in its worldwide exchange store system. An at-a-glance picture of sales performance is shown in the following table:

	FY83 Sales	% of All Retail Sales	FY84 Sales	% of All Retail Sales
Worldwide	$70,547,000	2.1	$78,509,000	2.2
Domestic U.S.	40,650,000	2.0	43,671,000	2.1
Overseas	29,071,000	2.2	33,910,000	2.5
Mail Order	826,000	1.3	927,000	1.5

The Navy Resale and Services Support Office (NAVRESSO) also reports a healthy sales gain in the toys and wheel goods category. FY84 sales increased by 14 percent over FY83 sales, accounting for 2.3 percent of all Navy exchange worldwide retail sales. A breakdown of Navy's sales by geographic area follows:

	FY83 Sales	% of All Retail Sales	FY84 Sales	% of All Retail Sales
Worldwide	$22,525,217	2.2	$25,666,422	2.3
Domestic U.S.	14,137,090	2.0	17,161,926	2.2
Overseas	8,388,127	2.5	8,504,495	2.5

Top Of The Dolls

In the doll category, Coleco's Cabbage Patch Kids are the leaders for the third consecutive year. Last year, sales of the Cabbage Patch Kids line exceeded $500 million, and this year there are even more additions. There's even a Cabbage Patch telephone, featuring a blonde-haired, blue-eyed Cabbage Patch Kid figure for the receiver to rest upon.

Coleco is featuring fun furs for the Kids to wear, as well as a full line of accessories for Playmates, the Cabbage Patch Kids' dolls.

Mattel's Barbie continues to reign as the queen of fashion dolls, even after 25 years on the market. This year, Day to Night Barbie is ready for any career situation, from dancer to tv news reporter. As a business executive, Barbie wears a pink suit and carries an attache case, complete with calculator and credit card. Companion Ken looks very much the Yuppie in his pin-stripe business suit.

There is a new collector series of Barbie dressed in gowns by designer Oscar de la Renta.

Interest in the games category will be maintained this year with a new Genus II edition of Trivial Pursuit. Milton Bradley is introducing Stage II, a trivia game where players answer questions while trying to guess the theme which ties them together.

One of the fastest-growing of all categories features toys for infants. The baby-boom generation is producing its own baby boomlet, with parents who tend to be older, better educated, and with more disposable income. That combination spells a potential for greater sales.

Mattel is tapping into the infant toy market with its Angel Bunny line of 14 toys, from a plush Snuggle Bunny to a Musical Entertainment Center.

Tonka is offering Pound Puppies that are washable and hypo-allergenic. Each puppy comes with a leather collar and puppy care sheet.

Hasbro's pre-school toys are being touted this year by "spokesmom" Joan Lunden, mother of two and co-host of ABC TV's Good Morning, America.

With the variety and number of toys on the market for 1985, it's no wonder the Christmas "want" lists for most kids will be record-breaking in length.

The enormity of the task of merchandising all those toys is even a bit daunting to the buyers. "You get bogged down in the details," says AAFES's Oliverio, "and the glamor of the toy market disappears." It's then, he says, "that I like to stop and think, 'Hey, I'm in the business of making kids happy.' " ■

Continued from page 47

		Dollars			Units		
		1983	1984	% Change	1983	1984	% Change
	Non-Powered Veh. Sets/ Access.	70	78		11	9	
	Non-Powered Veh. 6" or Less	171	145		209	146	
	Non-Powered Veh. Over 6"	103	149		21	25	
VII.	**Arts/Crafts/Models**	$326	$391	+20%	177	190	+7%
	Paint Sets & Supplies	40	41		26	23	
	Crayon/Chalk/Drawing Sets & Supplies	110	113		72	77	
	Other Sets/Supplies	105	148		51	58	
	Plastic Model Kits	71	89		28	32	
VIII.	**Miscellaneous Activity Toys**	$247	$275	+11%	130	132	+2%
	Wipe-Off Boards/Magic Slates	4	3		7	6	
	Paper Dolls	2*	2		1*	1	
	Reusable Compounds	17	21		20	21	
	Mechanical Design Toys	20	18		5	4	
	Musical Toys	59	51		12	8	
	Remaining Misc. Activity	145	180		85	92	
IX.	**Role Playing Toys**	$170	$231	+36%	51	67	+31%
	Appliances-Powered/Non-Powered	83	120		9	14	
	Tea Sets	22	21		12	9	
	Other Household/Food Toys	16	8		3	2	
	Other Role Playing Toys	49	82		27	42	
X.	**Infant/Pre-School**	$508	$715	+41%	130	167	+28%
	Infant Toys	162	208		57	62	
	Pre-School Blocks	21	32		6	8	
	Pre-School Learning Toys	30*	46		5	6	
	Pre-School Talking/ Sound Toys	58	60		11	10	
	Pre-School Tub Toys	9	16		6	12	
	Pre-School Push/Pull Toys	24	29		7	6	
	Pre-School Playsets	39	43		5	5	
	Remaining Pre-School	165	281		33	58	
XI.	**Remaining Miscellaneous**	$1,018	$1,435	+41%	461	533	+16%
	Toy Guns/Rifles	54	64		18	23	
	Bldg. Sets/Construction Toys	97	141		16	20	
	Activity Books	73	77		153	154	
	Learning/Study Books	9	29		11	27	
	Remaining Books	111	159		104	115	
	Plush	360*	544		112*	125	
	Audio/Visual	239	332		32	48	
	Educational/Scientific Toys	21	30		9	13	
	Children's Furniture	54	59		6	8	
•	**TOTAL INDUSTRY**	**$7,506**	**$8,993**	**+20%**	**1,903**	**2,161**	**+14%**
•	**INDUSTRY EXCLUDING TV VIDEO**	**$5,346**	**$8,063**	**+51%**	**1,821**	**2,103**	**+15%**

Notes:
* 1983 Figures revised from previous report
** Limited sample
*** Source: Electronic Industries Association Consumer Electronics Group (JAN 1985)
! First Billing Value: first price paid for an item in the U.S.
\# Insufficient Data
Volumes have been projected to reflect total industry levels.
Source: Toy Manufacturers of America.

CANDY & SNACK FOODS MARKETING

The Military's Munch Bunch

BY MARIE KRAKOW

An almost endless stream of new products is combining with new merchandising techniques to strengthen the already impressive sales gains in the candy, confectionery and snack foods grocery categories.

Every year military consumers have their candy, chips, cookies, crackers, nuts, gum, pies, pretzels, extruded snacks (like cheese curls) and granola, and eat them, too.

In fact, thanks to favorable year-to-year marketing trends in the multi-billion dollar confectionery and snack foods retail industry, estimates from *Interservice* research suggest that military patrons spend at least $450 million a year on these items, with the greatest sales volume share coming from the candy-confectionery category.

The outlook for sales in the candy-confectionery category is a positive one. "We are very optimistic about the potential for growth in the confectionery snack food category over the next five years," says James Finelli, military-government sales manager for M&M/Mars, the leading manufacturer and supplier of candy to the military.

"We see category growth of 10 percent per year industry-wide," Finelli says.

Fine-Tuned Merchandising

For candy as well as the other snack food categories, the key difference in marketing to and merchandising in commissaries versus exchanges concerns package sizes.

In commissaries, where large families tend to make planned purchases in key shopping expeditions twice a month, multipacks of candy are the rule, as are large supermarket size bags or boxes of chips, cookies and other snacks.

Exchanges sell primarily the smaller items, such as gum and roll candy and single-serve bags and single candy bars, which are usually purchased on impulse near the front end of the store.

In commissaries, the key preferred location for candy and snack food items are the mid-store gondolas, not the front end.

"We conducted our own commissary study several years ago in Air Force commissaries to determine the best location for hard roll candy and chewing gum," notes Ken Gaynor, director of military sales for Life Savers, Inc.

"It proved that the ideal location for multipacks is in the candy section. By the time commissary shoppers get to the front of the store, their planned purchases are complete."

Opportunities For Growth

M&M/Mars' Finelli is convinced that candy is an underdeveloped feature item in commissaries, precisely because they don't sell singles or king-size items at the front end, which he describes as "the most valuable real estate in the store."

If commissaries would merchandise singles and king-size candy bars at the front end, they could realize up to a 20 percent growth opportunity, he maintains.

Military patrons spend at least $450 million a year on confectionery and snack food items.

They could realize an even bigger opportunity, he believes, if they would allocate space commensurate with the sales velocity of a product by pack size and, "concentrate on the high-demand products."

"The fast sellers are continually out of stock," Finelli says. "Take Snickers Bars, for example. The brand experiences about 30% out-of-stock rates in the military due to high patron demand," he says.

Frito-Lay, the number one manufacturer and supplier of salty snack food products to the military, utilizes a system to prevent out-of-stock situations at commissary stores and large exchanges.

Marie Krakow is a Princeton Junction, NJ-based freelance writer. She is a former business publications editor who has written widely about food and non-food retailing subjects.

PHOTOGRAPH BY JOHN BURWELL

The company uses direct store delivery (DSD), the nation's largest store-door delivery system, to get its products into commissaries very early in the morning, according to Felicia Zimmerman, the company's account manager for the military.

Frito-Lay itself insures that local representatives stock the commissary shelves, and where a large outlet should begin to sell out of a product the same day, the company's delivery truck returns and restocks the store's gondolas.

Favorable Demographics

"A great portion of our overall sales and marketing effort is placed on the military. It's a very important segment of the marketplace to us," Frito-Lay's Zimmerman comments. Many military sales managers at other snack food companies share her view.

The demographics of the military consumer are especially favorable to the market, particularly the age range. Many large military families with young children, for example, tend to shop the commissaries.

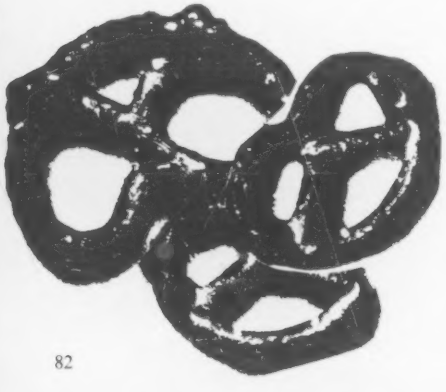
Studies have shown that the majority of all salty snack consumers are in the age group ranging up from 17 years to the mid-40s, according to Frito-Lay's Zimmerman.

"The profile of the heavy, salty snack user links up very well with the military age group profile, so there's a lot of synergy right there," she notes.

"Big" Is New For Candy

Although candy is by far the largest-selling segment of the combined snack/candy-confectionery industry, accounting for nearly a third of total sales, chocolate is the leader within the candy category, accounting for more than 70 percent of candy sales, according to the Commerce Department. Singles (as opposed to multi-packs) are the most popular candy items.

To capitalize on these proven consumer preferences, many leading candy makers either already have or are in the midst of introducing a "big bar" category of single chocolate bars.



Big Bars Come To Market

The creation of a "big bar" category for single chocolate bars and single-pack chocolate piece candy has become a key trend in the confectionery industry. Here's what some of the major manufacturers are doing to respond to consumer demand for these hot new items:

■ **Hershey Chocolate Company** – In 1984 tested Hershey Big Block, plus Golden Almond Bars, Golden Pecan Bars and Golden Almond Solitaires (chocolate covered almonds in a pouch) in three military commissary regions, where they continue to be sold.

■ **Life Savers, Inc.** – Plans to introduce a new 4 oz. ("quarter pounder") version of its popular Baby Ruth & Butterfinger candy bars in May this year. Views big bar category as a "big opportunity."

■ **M&M/Mars** – Has introduced a 3.7 oz. Snickers King Size and 3.1 oz. sizes of M&M's Plain King Size and M&M Peanut King Size. Is now testing a 2.1 oz. size of Royal Mint Chocolates in military and civilian markets in the Baltimore/Washington area.

■ **Peter Paul Cadbury** – In 1984 restaged entire Cadbury lineup of products with new sizes, labels, and packages. These "very, very successful" relaunches included Cadbury's Dairy Milk Chocolate, Hazelnut, Brazilnut, Fruit & Nut, and Almond Bars in a giant 7 oz. size; Caramello Bar, 6.5 oz.; plus Caramello, Dairy Milk Chocolate, Hazelnut, Fruit & Nut, and Almond Bars in a 3.5 oz. large bar size.

"There's a tremendous number of new products in the candy industry which were fostered, in part, because commodity costs came down so rapidly between 1980 and 1983," says food industry analyst Ronald Morrow, vice president of research for Smith Barney, Harris Upham & Co., New York. "Most of the major candy producers have really tried to upgrade their product line to capture the premium price segment. The growth in this area has been fairly dramatic," Morrow explains.

The growing popularity of the new big bar category, which captured 7 percent of 1984 sales for all loose candy bars sold in the U.S. may gradually erode the ingrained reluctance of commissary stores to stock and merchandise single candy bars, some in the industry feel.

Hershey Chocolate Company, which ranks very closely behind M&M/Mars as the leading candy producer and supplier to the military, last year tested its Hershey Big Block and three premium-priced big bar singles in three military commissary regions. The test was so successful, according to Christopher Coyle, manager for government sales, that Hershey hopes to see the commissary stores of the other service branches accept these products.

Other New Product Trends

As this story was being written, M&M/Mars was planning to introduce a completely new candy product, Fanfare rolled chocolates, exclusively to the military market prior to any civilian market introduction.

By using military commissaries and exchanges for the introduction, the company could encompass an entire marketplace with no spillover, yet not overtax production capacity, Mr. Finelli explained. Fanfare is a light, rolled chocolate snack with a hazelnut creme center in a gift box.

In the chips/cookies/crackers segment of the snack food industry, the trend is toward lighter, less oily or salty, or thicker or different textures.

In the chips/cookies/crackers segment of the snack food industry, the trend is toward new products that are lighter, less oily or salty, or which are a little thicker or have different textures, notes industry analyst Morrow at Smith Barney.

"This industry is just coming out of a recession where there was no growth at all. There was an absolute dearth of new products. We've seen much more product introduction this last year," the food analyst said, noting that although the industry has since been somewhat revitalized, it's not showing the kind of sales and unit movement that it used to grow at.

Frito-Lay's new thicker O'Grady's brand potato chip was the biggest new entry in

Advertising To The Military

Because military consumers get a great deal of exposure to civilian advertising, the confectionary and snack food industry relies heavily on its domestic print, radio, and television ads to capture the military market. As one experienced military marketer points out, "They all have TV!"

One message that will be beaming into military homes this year via civilian advertising is that chocolate bars are permissible snack foods to include in a regular diet. Major U.S. candy makers have repositioned chocolate as a satisfying food rather than an occasional taste treat.

But in addition to their regular schedule of civilian advertising, most of the bigger candy and snack food companies, including M&M/Mars, Frito-Lay, Life Savers, and Nabisco, also use at least a limited amount of coupon-type print ads in military-only publications.

Hershey Chocolate Company, which for some years directed no special advertising to the military, will run two coupon ads in military publications in 1985, and may expand its military media schedule in 1986.

"The military tends to stick with the military. It's very much a closed community," says one military sales director in explaining his company's use of military advertising.

"We find military advertising useful," another explains, "because there is a certain degree of the military market that really isn't exposed to the civilian media."

1984, a Frito-Lay spokesman said. He added that O'Grady's brand potato chips sold over $200 million retail in its first year.

Moist, chewy cookies are another new entry the industry has high hopes for this year. Nabisco's new line in this category, Almost Home, is joined by others, including a Keebler soft cookie, Soft Batch; a Duncan Hines ready-to-eat cookie just introduced by Procter and Gamble; and a Frito-Lay soft cookie addition to its Grandma's cookie line.

"It's an open, active, alert, alive marketplace. It had been static until we all got excited about this new soft-baked type cookie like Almost Home," says E.R. "Tubby" Seawell, director of military sales for Nabisco Brands USA and current president of the American Logistics Association.

"I believe we've just got more people eating more cookies," Seawell comments. "The cookie market had been static, but we seem to have expanded that market with some real across-the-board growth in all cookie categories," he adds.

Displays And Promotions

Another growing trend in the candy and snack food industry is the increased use of point of purchase (POP) displays and promotions to increase store traffic and boost sales. In some cases, when offered with voluntary price reductions (VPRs), the results of these merchandising efforts are very dramatic.

One manufacturer's military sales director, who asked not to be identified for competitive reasons, said that when his company offers VPRs, and is successful in getting end-aisle or off-shelf floor displays for its popular cookie product, the sales velocity tends to jump *ten times* the normal monthly consumption.

Life Savers, a Nabisco company, is trying to interest resale outlets in specialized "prepack displays," which Gaynor estimates can triple the sales of a product when properly used.

A prepack display is a self-contained shipper with product and a fold-out sign explaining a special offer inside.

"We just did a very, very successful Baby Ruth and Butterfinger prepack display in exchanges that featured four candy bars for 99¢," Gaynor explains. "We just shipped the prepack displays to the exchanges and they simply unfolded them to create our instant floor stand displays."

Frito-Lay provides custom-tailored point of purchase display racks and merchandising materials to its military customers, in addition to monthly VPRs and special VPRs for its new products.

In commissary stores these are typically secondary displays called "maximizers," used for temporary or permanent displays in key store locations. In exchanges, particularly in shoppettes and mini-marts, the resale outlet would be more likely to receive "front end" impulse merchandiser racks to place near cash registers.

Through its worldwide military broker, Peter Paul Cadbury is running a springtime point of purchase promotion in commissaries and exchanges which is tied to the Special Olympics for handicapped children.

The candy maker used the same promotion last year, pledging to donate a certain dollar (or dollar fraction) amount per case sold to the Special Olympics.

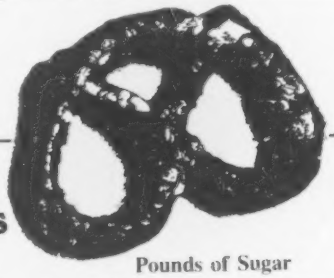
"It was a very successful promotion," says Cadbury's James Rowlette, division manager of key accounts. "We found, of course, that military people were very generous and seemed to support the sales effort, realizing that the money was going to a very good cause."

The Army and Air Force Exchange System (AAFES) and the Navy Resale and Services Support Office (NAVRESSO) each have developed their own exchange-wide programs to employ point of purchase displays more effectively at the front end of their exchange stores.

At AAFES, the effort is extensively detailed in headquarters-developed planograms, depicting the exact configurations exchange stores should use to lay out impulse items in their front-end display racks.

According to merchandising information researched and developed by one leading candy manufacturer, front-end candy profits can be greatly increased by using vertical checkout merchandising racks and or carousel-type display units, for leading brands and king-size candy bars.

For commissaries, however, this manufacturer's research concludes that these types of items should *not* be merchandised on the mid-store candy gondola(s) with packaged items. This could cause "trading



Sugar Deliveries Top 2.2 Billion Pounds

Confectioners bought some 450.5 million *more* pounds of sugar last year than they did five years earlier, marking a close parallel with the lower commodity prices industry analysts say have helped to spur the introduction of new candy products. The following figures, which detail the actual amounts of sugar delivered to producers of confectionary and related products, were supplied by the statistical reporting service of the U.S. Department of Agriculture:

Year	Pounds of Sugar Delivered to Confectioners
1979	1,762,083,500
1980	1,812,168,900
1981	1,926,498,700
1982	1,878,725,300
1983	2,174,342,100
1984	2,212,546,300

The Military's Leading Best-Sellers

Neither the Army nor Navy commissary systems were able to provide breakdowns for total sales of candy and snack foods, or which items in those categories are best sellers. However, the Air Force Commissary Service (AFCOMS), Navy Resale and Services Support Office (NAVRESSO) for exchanges only, and the Army and Air Force Exchange Service (AAFES) all provided *Interservice* with up-to-date statistics, which follow below:

AAFES

Candy and snack foods combined represent 3.3% of AAFES total worldwide sales, or $116,200,000. Category-by-category sales breakdowns are as follows:

Category	% of Total AAFES Sales		Category $ Sales
Candy bars	.85% of sales,	or	$30,000,000
Multipack candy, bars and bags	.53% of sales,	or	$18,500,000
Boxed candy	.14% of sales,	or	$ 5,000,000
Chips (potato and corn)	.51% of sales,	or	$18,000,000
Cookies	.51% of sales,	or	$18,000,000
Nuts	.23% of sales,	or	$ 8,100,000
Miscellaneous snacks	.17% of sales,	or	$ 6,000,000
Chewing gum	.22% of sales,	or	$ 7,800,000
Mints	.09% of sales,	or	$ 3,000,000
Cough drops	.05% of sales,	or	$ 1,800,000

AAFES Top Ten Snack Items

1. Fritos brand corn chips, 2 oz. size	$1,958,041
2. Chips Ahoy chocolate chip cookies, 13 oz.	$1,002,989
3. Cashews (salted), 6.5 oz.	$1,635,000
4. Mixed nuts with peanuts, 12 oz.	$ 854,635
5. Pistachio nuts, 6 oz. pack	$ 746,357
6. Potato chips, 7.5 or 8 oz.	$ 743,294
7. Ritz crackers, 12 oz.	$ 691,990
8. Oreo cookies, 16 oz.	$ 688,986
9. Doritos brand tortilla chips, 7.5 oz.	$ 671,494
10. Fig Newton cookies, 16 oz.	$ 634,874

AAFES Top Ten 35¢ Candy Bars

1. Snickers	$3,431,515
2. M&M's Peanut	$2,808,942
3. Reese's Peanut Butter Cups	$1,769,916
4. M&M's Plain	$1,529,272
5. Kit Kat	$1,330,285
6. Baby Ruth	$1,238,831
7. Butterfinger	$1,077,435
8. Three Musketeers	$ 966,272
9. Peter Paul Almond Joy	$ 850,579
10. Twix Caramel	$ 780,573

AFCOMS

Candy represents 1.5% of Air Force commissary grocery sales worldwide, or $24,256,575 for fiscal year 1984; snack foods represent 2.5% of sales, or $40,427,624. Total sales for candy and snack foods amounted to $64,684,199.

According to the Air Force Commissary Service (AFCOMS), the top selling candy items in Air Force commissaries are: Snickers; M&M's Chocolate Candies; Milky Way Bars; Reese's Peanut Butter Cups; Hershey Chocolate Bars; Mars Bars; Three Musketeers Bars; Nestles Chocolate Bars; and Butterfinger.

The top selling AFCOMS snack items are: Lay's brand potato chips; Ruffles brand potato chips; Fritos brand corn chips; Doritos brand nacho cheese tortilla chips; Planters peanuts; Orville Redenbacher popcorn; Jolly Time popcorn; Pringles potato chips; Rold Gold pretzels; and Planters assorted snacks.

NAVRESSO—Exchanges

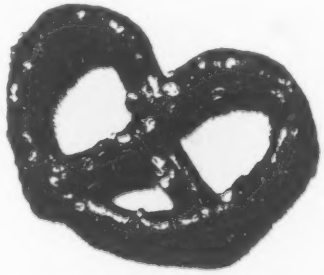
For 11 months of operation through December 1984, Navy exchanges reported worldwide candy sales of $15,975,000, representing a 12% increase over the same period of 1983.

Worldwide retail snack sales for the period were $1,047,010, an increase of 4.5% over the same span of 1983.

Approximately 2.8% of total Navy exchange retail sales are represented by candy and snack purchases.

The best-selling candy and snack food products in Navy exchanges, not necessarily in order, include: Snickers Bar; M&M Peanut and Plain Chocolate Candies; Kit Kat Bar; 3-Musketeers Bar; Reese's Peanut Butter Cups; chocolate chip cookies (all brands); Oreo Cookies; and Frito-Lay salty snacks (all varieties and sizes).

Based on these figures, Navy exchange sales of candy and snack food items increased at a rate almost triple that for overall retail sales.



Seasonal Candy, Snack Sales To The Military A Treat, No Trick

When Halloween, Easter, Christmas, and Valentine's Day roll around each year, they keep military sales managers in the candy and snack food industry smiling.

"We do a better job relatively speaking on Halloween in the military than we do in civilian business," explained Ken Gaynor, national manager of military sales for Life Savers, Inc.

"We have a little less competition, for one thing. Plus the military consumers are young, they are very price conscious, they usually know a good deal, and they are volume conscious. They prefer larger pack sizes. Even though they won't necessarily be given out as Trick or Treat items, those are the type packs that appeal to military patrons."

For those reasons, and also because holiday candy items tend to be planned purchases rather than impulse buys, commissaries do a much larger volume of the Halloween business than do exchanges, he noted.

Other industry spokesmen agree that the military market rivals, if not betters, the civilian market for its relative volume of holiday sales in candies and snack foods.

"Military customers buy more regular candy items that are wrapped in special 'seasonality packs' (i.e., red and green foil for Christmas) than do their civilian counterparts,' comments James Finelli, military government manager for M&M/Mars.

At Peter Paul Cadbury, which does a heavy Easter trade with its popular Cadbury Creme Eggs and Cadbury Mini Eggs, division manager of key accounts James Rowlette believes one of the reasons why the company has such an excellent seasonal franchise in the military market is "because so many of the military people have traveled to Europe at one time or another in their careers, and are more familiar with the Cadbury name."

The cookie/cracker segment of the industry is also affected by cyclical or holiday buying, according to Nabisco Brands USA director of military sales, E.R. "Tubby" Seawell.

"During the last two months of the year, when Thanksgiving arrives and the Christmas and New Year's holidays are coming, our sales of snack crackers like Triscuits and Wheat Thins, plus Ritz Crackers and Premium Saltines, tend to jump appreciably because of the holiday season and the partying," he said.

"The military is beginning to recoup the benefits from the seasons," states Christopher Coyle, manager of government sales for Hershey Chocolate. "They are beginning to understand from a store level how important seasons are in satisfying their patrons. And the Halloween, Easter and Christmas trade is becoming a larger segment of our business year by year."

down" from packages to singles, versus the opportunity to create new sales and category expansion with singles and king sizes at the front of the store.

What Military Buyers Are Doing

Military buyers at exchanges in particular are paying closer attention to more sophisticated merchandising techniques, and are placing more emphasis on outside research to make decisions about candy and snack food buys.

Three of the basic "yardstick" research tools widely studied by the military include data from Sales Area Marketing, Inc. (SAMI), which tracks product movement through warehouses; data from A.C. Neilsen, which tracks product movement through the front end of retail outlets; and data from Distributors Electronic Billing Systems (DEBS), which tracks product movement through distributors.

SAMI data is said to have the most credibility with the military, despite the fact that some snack food items, such as cookies and crackers, are not included in the data. For example, the U.S. Army Troop Support Agency, the resale service for the Army commissary system, cited SAMI statistics as a guideline for what sells best in its commissary stores.

Research provided by the food companies themselves is also taking on a new importance to military buyers. One leading manufacturer, for example, has developed an audiovisual confectionery sales growth program presentation for the headquarters of the various resale systems.

"It's important that the military receive the benefits of all the merchandising studies and technology available from major companies," Gaynor of Life Savers believes.

"If companies can give a good, objective approach to merchandising everyone's products, the military will benefit, the patrons will benefit, the stores will benefit, and individual companies will get their fair share of the business. As far as we're concerned, that's what we're looking for," Gaynor concludes.

Research provided by the food companies themselves is taking on a new importance to military buyers.

"I think the military's doing a nice job of staying current with the marketplace. The resale services seem to be more attuned and alert to new item introductions and innovations in merchandising and new product lines," Nabisco's Seawell added.

One military sales manager sums it up this way: "Some years back we usually had to wait until we had a product completely launched in the civilian marketplace. Now they [the resale services] want to be included in the test markets and relaunches, and they want to have the product when the civilian advertising breaks."

Indeed, the biggest challenge, if current trends in the candy-confectionery and snack foods markets continue, will simply be to keep abreast of new products and the occasional creation of entirely new item categories.

Today's indications are that the resale systems and their suppliers are up to the challenge, and will continue to work to bring military customers their preferred munch bunch. ■

4th Annual Military Demographics Report

BY ALAN GOLDSTEIN

Attempting to find the one fact or figure that speaks for all others in the military demographics datastream is a seemingly impossible task. The profile of people in uniform, their dependents, and aggregate numbers counting and tabulating the millions of others considered to be in the military orbit must simply take into account too many variables to be meaningful to market research and sales planning specialists.

The dilemma is that what interests one specialist may be of no particular intrinsic value to anyone else.

This report therefore marks a departure from *Interservice* coverage of the subject in previous years. The following pages reflect an attempt to distill into a minimum amount of space those salient facts and figures with the greatest intrinsic value to the greatest number of readers.

The words that best sum up the DoD's current manpower efforts are "consistency" and "improvement." Recruiting targets have consistently been met or exceeded, and the quality and education of today's recruits has improved markedly.

Despite a stepped-up reliance on Guard and Reserve forces, the Pentagon is seeking an FY86 active duty end strength increase of 25,630 men and women over FY85 levels to almost 2.2 million. Provided Congress approves the DoD's request, the Navy's strength will increase by 15,000; the Air Force will add 9,430; the Marine Corps will swell by 1,200; and the Army's active strength will remain unchanged.

The DoD's pay, compensation, and people-benefits story is a promising one. A 3% military pay raise programmed for FY86 is effective July 1 this year, and a DoD legislative package that seeks to improve health, PCS, and other benefits and allowances seem all but assured of passage.

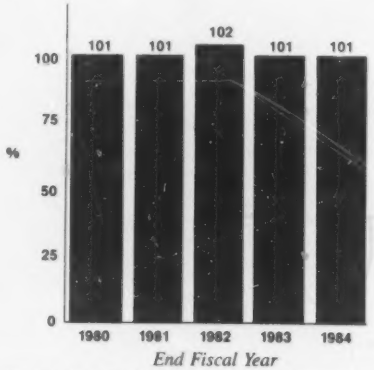
Closely allied with pay, allowances, and other quality of life improvements are a series of actions designed to emphasize and recognize the military family. Housing construction for families, for example, has increased 81% since President Reagan took office.

The following tables are intended only to serve as a basic outline of the military's current demographic profile. Anyone who wishes to delve further into the military demographics datastream is encouraged to contact the American Logistics Association for additional information. ■

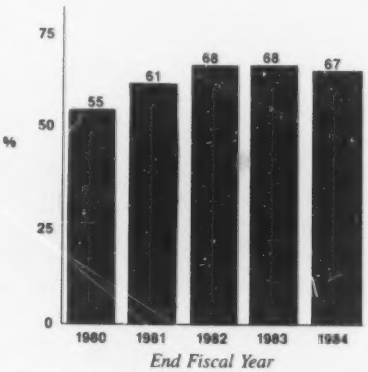
Alan Goldstein is director of information and research with the American Logistics Association. He's also editor of Interservice *magazine.*

DoD's Military Manpower Improvements 1980–1984

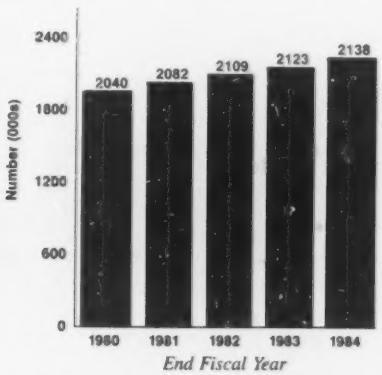
Recruiting Goals Exceeded



Re-Enlistments Stable



Higher Total Strength*



*Includes Navy, Training and Administration of Reserves (TARs) that are counted as Selected Reservists.

Source: Department of Defense, *Annual Report to the Congress, Fiscal Year 1986.*

All Military On Active Duty By Pay Grade (As of September 30, 1984)

Rank/Grade	Total DoD	Army	Navy	Marine Corps	Air Force
			Officers		
General-Admiral	35	12	8	2	13
Lieutenant General-Vice Admiral	127	49	33	7	38
Major General-Rear Admiral (Upper)	362	140	82	23	117
Brigadier General-Rear Admiral (Lower)*	525	195	128	33	169
Colonel-Captain	14,625	4,783	3,709	627	5,506
Lieutenant Colonel-Commander	32,600	10,771	7,626	1,653	12,550
Major-Lieutenant Commander	52,339	16,913	12,855	3,051	19,520
Captain-Lieutenant	101,713	34,772	21,248	6,082	39,611
1st Lieutenant-Lieutenant (Junior Grade)	41,604	12,249	10,584	4,371	14,400
2nd Lieutenant-Ensign	39,522	12,600	9,501	3,106	14,315
Warrant Officers (W-1 to W-4)	19,892	15,399	3,082	1,411	–
Total Officers	**303,344**	**107,883**	**68,856**	**20,366**	**106,239**
			Enlisted		
E-9	14,311	4,182	4,025	1,262	4,842
E-8	37,843	15,647	8,801	3,732	9,663
E-7	126,966	50,557	30,713	9,177	36,519
E-6	231,538	86,856	72,987	15,434	56,261
E-5	350,838	118,492	98,419	25,068	108,859
E-4	422,670	183,661	104,298	31,953	102,758
E-3	370,133	98,860	98,973	47,648	124,652
E-2	137,150	51,929	37,366	25,834	22,021
E-1	129,808	57,527	35,706	15,740	20,835
Total Enlisted	**1,821,257**	**667,711**	**491,288**	**175,848**	**486,410**
Cadets & Midshipmen	**13,556**	**4,586**	**4,494**	–	**4,476**
Grand Total	**2,138,157**	**780,180**	**564,638**	**196,214**	**597,125**

*Includes the newly re-established rank of Commodore.

Source: Department of Defense, *Selected Manpower Statistics – FY 84.*

Median Age Of Military Personnel By Sex (As of September 30, 1984)

	Active Duty Males				Active Duty Females			
	1983		1984		1984		1984	
Attained Age	Number	%	Number	%	Number	%	Number	%
17	7,000	.4	7,000	.4	1,000	.3	1,000	.4
18	65,000	3.4	66,000	3.4	6,000	2.8	6,000	3.1
19	137,000	7.2	128,000	6.7	13,000	6.7	12,000	6.1
20	166,000	8.7	163,000	8.5	18,000	9.3	16,000	8.2
21	165,000	8.6	162,000	8.4	20,000	10.1	19,000	9.3
22	151,000	7.9	146,000	7.6	20,000	10.2	19,000	9.5
23	131,000	6.8	133,000	6.9	18,000	9.0	18,000	9.2
24	113,000	5.9	117,000	6.1	16,000	8.2	16,000	8.0
25	99,000	5.2	102,000	5.3	14,000	6.9	15,000	7.3
26	88,000	4.6	90,000	4.7	12,000	6.2	12,000	6.1
27	78,000	4.1	81,000	4.2	10,000	6.4	11,000	5.5
28	70,000	3.7	72,000	3.7	9,000	4.6	10,000	4.8
29	64,000	3.3	65,000	3.4	8,000	4.1	8,000	4.2
30	59,000	3.1	60,000	3.1	7,000	3.4	7,000	3.6
31	54,000	2.8	55,000	2.9	5,000	2.7	6,000	3.0
32	49,000	2.6	51,000	2.7	4,000	2.2	5,000	2.5
33	46,000	2.4	47,000	2.4	3,000	1.7	4,000	2.1
34	48,000	2.5	45,000	2.3	3,000	1.4	3,000	1.6
35	48,000	2.5	46,000	2.4	2,000	1.1	3,000	1.3
36	51,000	2.7	46,000	2.4	2,000	1.0	2,000	1.0
37	38,000	2.0	49,000	2.5	1,000	.6	2,000	.9
38	31,000	1.6	35,000	1.8	1,000	.4	1,000	.5
39	29,000	1.5	28,000	1.4	1,000	.3	1,000	.4
40-44	90,000	4.7	90,000	4.7	2,000	.9	2,000	1.0
45-49	29,000	1.5	29,000	1.5	1,000	.3	1,000	.3
50 & Over	8,000	.4	8,000	.4	*	.2	*	.2
Total Over 40	**127,000**	**6.6**	**119,000**	**6.2**	**3,000**	**1.4**	**3,000**	**1.3**
Total	**1,914,000**	**100.0%**	**1,921,000**	**100.0%**	**197,000**	**100.0%**	**200,000**	**100.0%**
Median Age in Years	24.6		24.7		23.6		23.7	

*Less than 500.

Source: Department of Defense, *Selected Manpower Statistics – FY 1984.*

Distribution of Active Duty Military by Region and State (As of September 30, 1984)

Region and State	Active Duty Military Population						1980 Population Census	
	Army	Navy	Air Force	Total Number	% of U.S. Total	% Change 1983–84	Total	% of U.S.
New England	6,407	13,109	10,038	29,554	2.1	−0.8	12,348,200	5.4
Connecticut	209	6,202	56	6,467	0.4	+10.3	3,107,500	1.4
Maine	40	1,774	3,264	5,438	0.3	+0.4	1,124,600	0.5
Massachusetts	5,918	1,030	2,566	9,514	0.6	−8.4	5,736,000	2.5
New Hampshire	113	340	3,704	4,157	0.3	+1.5	920,600	0.4
Rhode Island	100	3,754	59	3,913	0.2	−1.5	947,100	0.4
Vermont	27	9	29	65	0.0	+8.3	511,400	0.2
Mid Atlantic	42,137	29,197	31,409	102,703	7.5	−3.3	42,237,100	18.6
Delaware	42	23	4,884	4,909	0.3	−0.5	595,200	0.3
District of Columbia	5,627	4,124	3,201	12,952	0.9	−2.9	637,600	0.3
Maryland	11,959	14,852	8,752	35,563	2.5	−0.5	4,216,300	1.9
New Jersey	13,036	1,824	5,029	19,889	1.4	−7.3	7,364,100	3.3
New York	9,307	3,874	9,186	22,367	1.6	−1.5	17,557,200	7.8
Pennsylvania	2,166	4,500	357	7,023	0.5	−12.2	11,866,700	5.2
Great Lakes	7,242	24,763	36,115	68,120	5.0	+5.2	41,669,500	18.4
Illinois	2,095	22,394	12,945	37,434	2.7	+3.2	11,418,400	5.0
Indiana	3,000	566	2,705	6,271	0.4	+3.5	5,490,100	2.4
Michigan	883	635	7,749	9,267	0.6	−3.5	9,258,300	4.1
Ohio	823	860	12,614	14,297	1.0	+20.8	10,797,400	4.8
Wisconsin	441	308	102	851	0.0	−9.8	4,705,300	2.1
Plains	30,595	2,2331	38,165	70,991	5.2	−4.2	17,181,700	7.5
Iowa	203	128	58	389	0.0	−15.2	2 913,300	1.3
Kansas	18,359	446	3,819	22,624	1.6	−8.1	2,363,200	1.0
Minnesota	333	360	129	822	0.0	−10.3	4,077,100	1.8
Missouri	11,363	967	3,665	15,995	1.1	−9.5	4,917,400	2.2
Nebraska	248	313	12,365	12,925	0.9	+5.2	1,570,000	0.7
North Dakota	29	9	11,883	11,291	0.8	+3.9	652,600	0.3
South Dakota	60	8	6,247	6,315	0.4	+0.0	690,100	0.3
Southeast	218,335	173,236	110,149	501,720	36.6	−1.5		
Alabama	19,903	651	4,624	25,178	1.8	+0.4	3,890,000	1.7
Arkansas	393	202	9,525	10,120	0.7	+2.3	2,285,500	1.0
Florida	1,965	37,500	29,638	69,103	5.0	−2.5	9,739,900	4.3
Georgia	52,501	2,957	4,276	59,734	4.3	−5.1	5,464,200	2.4
Kentucky	38,768	236	265	39,269	2.8	−5.1	3,661,400	1.6
Louisiana	15,076	1,656	8,994	25,726	1.8	−0.8	4,203,900	1.9
Mississippi	330	4,124	13,761	18,215	1.3	+0.5	2,520,600	1.1
North Carolina	42,331	48,155	9,741	100,227	7.3	+2.4	5,874,400	2.6
South Carolina	13,277	18,805	13,647	45,729	3.3	−9.0	3,119,200	1.4
Tennessee	350	11,518	297	12,165	0.8	+2.8	4,590,700	2.0
Virginia	33,300	47,188	15,337	95,825	6.9	+1.8	5,346,200	2.4
West Virginia	141	244	44	429	0.0	−2.0	1,949,600	0.9
Southwest	90,680	9,350	101,552	201,582	14.7	−2.4	52,645,600	23.2
Arizona	6,683	1,130	14,805	22,618	1.6	−7.4	2,717,800	1.2
New Mexico	1,403	546	15,007	16,956	1.2	+0.4	1,299,900	0.6
Oklahoma	18,212	192	12,390	30,794	2.2	−3.4	3,025,200	1.3
Texas	64,382	7,482	59,350	131,214	9.5	−1.6	14,228,300	6.3
Rocky Mountain	22,205	2,478	35,163	59,846	4.4	−0.4	21,271,200	9.3
Colorado	21,515	694	17,850	40,059	2.9	+0.4	2,888,800	1.3
Idaho	49	1,693	4,012	5,754	0.4	−4.1	943,900	0.4
Montana	33	22	3,986	4,041	0.2	−2.8	786,600	0.3
Utah	587	63	5,471	6,121	0.4	−1.9	1,461,000	0.6
Wyoming	21	6	3,844	3,871	0.2	+1.3	470,800	0.2
Far West	80,275	151,850	92,079	324,174	23.6	−0.6	32,595,700	14.3
Alaska	8,153	1,797	11,032	20,982	1.5	+1.4	400,400	0.2
California	27,788	121,584	54,419	203,791	14.8	−0.4	23,668,500	10.4
Hawaii	19,405	19,007	6,846	45,258	3.2	−1.0	965,000	0.4
Nevada	21	823	9,569	10,413	0.7	−11.9	799,100	0.4
Oregon	205	498	69	772	0.0	+0.3	2,632,600	1.2
Washington	24,703	8,141	10,144	42,958	3.1	+0.9	4,130,100	1.8
Undistributed	−0−	12,980	−0−	12,980	.9	−0−	−0−	−0−
Total U.S.	**497,876**	**419,194**	**454,600**	**1,371,670**	**100.0**	**−2.7**	**226,504,825**	**100.0**

Notes: Military details will not add to totals due to rounding. Navy totals include Marine Corps personnel; excluded are Navy/Marine Corps afloat or temporarily shore-based personnel. Census data are as of April 1, 1980.
Source: Department of Defense, *Distribution of Personnel by State and Selected Locations – Sept. 30, 1984.*

Top 10 Foreign Countries By U.S. Active Duty Personnel (As of December 30, 1984)

Rank Country	Army	Navy	Marine Corps	Air Force	Total
1. Germany (Fed. Rep. & W. Berlin)	209,188	337	98	39,380	**249,003**
2. Japan (Including Okinawa)	2,511	7,726	21,809	15,216	**47,262**
3. Republic of Korea	28,556	373	68	11,094	**40,091**
4. United Kingdom	206	2,257	366	25,841	**28,670**
5. Philippines	44	5,060	686	9,383	**15,173**
6. Italy	4,111	4,679	248	5,326	**14,364**
7. Panama	6,676	391	147	2,198	**9,412**
8. Spain	21	3,907	207	5,166	**9,301**
9. Turkey	1,277	103	19	3,744	**5,143**
10. Greece	535	470	14	2,676	**3,695**

Active Duty Personnel Overseas (As of September 30, 1984)

Regional Area/Country	Army	Navy	Marine Corps	Air Force	Active Duty Total	% Change 83-84
Totals	**258,780**	**265,146**	**31,172**	**131,387**	**686,485**	**−21.9**
Western & Southern Europe	217,723	24,377	3,000	88,354	**333,454**	**−2.7**
West Germany	209,188	377	98	39,380	249,003	−2.2
United Kingdom	206	2,257	366	25,841	28,670	+2.4
Italy	4,111	4,679	248	5,326	14,364	+5.9
Spain	21	3,907	207	5,166	9,301	−1.1
Turkey	1,277	103	19	3,744	5,143	−3.4
Afloat	0	10,243	1,740	0	11,983	−48.0
U.S. Territory & Special Locations	705	181,002	534	4,135	**186,376**	**+17.4**
Guam	33	4,716	358	4,062	9,169	−0.3
Puerto Rico	495	3,007	176	46	3,724	−2.4
Afloat	0	173,239	0	0	173,239	+4.7
East Asia & Pacific	31,254	36,832	25,516	36,035	**129,637**	**−5.7**
Japan	2,511	7,726	21,809	15,216	47,262	−3.1
Korea	28,556	373	68	11,094	40,091	+3.5
Philippines	44	5,060	686	9,383	15,173	+2.1
Afloat	0	23,156	2,865	0	26,021	−29.4
Africa, Near East & South Asia	1,345	14,691	578	420	**17,034**	**+20.9**
British Indian Ocean Territory	0	1,201	0	11	1,212	−34.6
Egypt	861	28	27	81	997	−32.8
Saudi Arabia	240	53	19	216	528	−20.3
Afloat	0	13,274	170	0	13,444	+33.5
Western Hemisphere	7,685	8,164	1,448	2,423	**19,720**	**−32.6**
Panama	6,676	391	147	2,198	9,412	+2.2
Cuba (Guantanamo)	0	1,808	468	2	2,278	−3.8
Bermuda	0	1,368	86	0	1,454	−30.0
Afloat	0	4,069	451	0	4,520	−92.7
Eastern Europe	68	5	96	20	**189**	**+2.6**
Antartica	0	75	0	0	**75**	**+12.0**

Notes: Details will not add to totals or subtotals because data include only selected leading countries/overseas territories. No adjustments are made for "transients" or "undistributed" personnel. Alaska and Hawaii are excluded from "U.S. Territory & Special Locations" data.

Source: Department of Defense

Distribution of Military Income by State
Fiscal Year 1984 ($ In Thousands)

State	Military Active Duty Pay	Reserve & National Guard Pay	Retired Military Pay	Total Military Payroll	Most Populous Active Duty Location
Alabama	491,859	134,692	376,301	1,002,852	Fort McClellan
Alaska	358,086	15,894	54,446	428,426	Elmendorf AFB
Arizona	435,099	40,148	411,151	886,398	Fort Huachuca
Arkansas	181,454	44,377	211,726	437,557	Little Rock AFB
California	5,087,703	310,412	2,432,412	7,830,527	San Diego
Colorado	649,433	58,325	442,285	1,150,043	Fort Carson
Connecticut	244,486	31,004	107,625	383,115	Groton
Delaware	84,415	16,497	47,747	148,659	Dover AFB
District of Columbia	333,274	48,372	201,303	582,949	Washington
Florida	1,712,492	92,362	1,600,373	3,405,227	Orlando
Georgia	1,008,174	192,322	562,411	1,762,907	Fort Benning
Hawaii	1,070,475	30,059	132,432	1,232,966	Schofield Barracks
Idaho	100,976	17,041	75,254	193,271	Mountain Home AFB
Illinois	669,908	107,213	261,818	1,038,939	Great Lakes
Indiana	125,334	95,864	155,240	376,438	Fort Benjamin Harrison
Iowa	10,967	36,440	68,521	115,928	Fort Des Moines
Kansas	425,064	71,127	154,441	650,632	Fort Riley
Kentucky	619,447	81,002	168,782	869,231	Fort Campbell
Louisiana	419,237	72,051	266,448	757,736	Fort Polk
Maine	149,691	21,623	89,794	261,108	Loring AFB
Maryland	727,946	87,262	406,057	1,221,265	Fort Meade
Massachusetts	198,058	106,382	211,634	516,074	Fort Devens
Michigan	174,912	73,712	176,353	424,977	K.I. Sawyer AFB
Minnesota	21,499	61,977	106,867	190,343	Minneapolis
Mississippi	363,487	56,783	193,898	614,168	Keesler AFB
Missouri	271,718	121,880	258,963	652,561	Fort Leonard Wood
Montana	68,921	16,304	48,658	133,883	Malmstrom AFB
Nebraska	278,078	23,441	102,606	404,125	Offutt AFB
Nevada	197,228	10,142	148,225	355,595	Nellis AFB
New Hampshire	82,226	15,236	88,106	185,568	Pease AFB
New Jersey	334,261	114,941	242,471	691,673	Fort Dix
New Mexico	321,293	18,906	180,494	520,693	Holloman AFB
New York	401,036	141,352	280,914	823,302	West Point Military Reserve
North Carolina	1,699,357	78,420	496,885	2,274,662	Fort Bragg
North Dakota	198,853	14,699	20,717	234,269	Minot AFB
Ohio	284,556	102,626	304,964	692,146	Wright-Patterson AFB
Oklahoma	538,731	82,640	283,069	904,440	Fort Sill
Oregon	17,216	35,829	174,805	227,850	Portland
Pennsylvania	238,038	220,986	382,324	841,348	Philadelphia
Rhode Island	112,609	20,492	59,762	192,863	Newport
South Carolina	1,070,139	116,994	403,037	1,590,170	Fort Jackson
South Dakota	108,064	15,932	31,676	155,672	Ellsworth AFB
Tennessee	203,616	70,247	308,748	582,611	Millington
Texas	2,304,422	201,159	1,657,357	4,162,938	Fort Hood
Utah	119,525	35,527	88,844	243,896	Hill AFB
Vermont	2,074	13,077	25,042	40,193	Burlington
Virginia	3,355,075	105,706	1,061,424	4,522,205	Arlington
Washington	889,173	90,318	558,997	1,538,488	Fort Lewis
West Virginia	9,359	24,033	73,061	106,453	Sugar Grove
Wisconsin	22,580	111,338	103,420	237,338	Milwaukee
Wyoming	65,285	8,521	31,342	105,148	Francis E. Warren AFB
Total U.S.	**28,856,909**	**3,713,687**	**16,331,230**	**48,901,826**	**Fort Bragg, NC**
Guam	278,201	1,217	12,437	291,855	
Puerto Rico	60,960	24,796	45,182	130,938	
Total U.S. and Selected Areas	**29,196,070**	**3,739,700**	**16,388,849**	**49,324,619**	

Note: Payroll outlay data are estimated because calculated and prorated data are included. Outlays comprise gross earnings of personnel which, except for retired military personnel, is compensation for personnel services rendered the government and cash allowances for personnel benefits. Outlays for military personnel temporarily shore-based or afloat are reported at the members' home port.
Source: Department of Defense, *Atlas/State Data Abstract for the United States – FY 1984.*

Women On Active Duty By Pay Grade (As of September 30, 1984)

Rank/Grade	Total DoD	Army	Navy	Marine Corps	Air Force
			Officers		
General-Admiral	–	–	–	–	–
Lieutenant General-Vice Admiral	–	–	–	–	–
Major General-Rear Admiral (Upper)	–	–	–	–	–
Brigadier General-Rear Admiral (Lower)*	7	2	2	–	3
Colonel-Captain	274	91	93	9	81
Lieutenant Colonel-Commander	1,024	320	323	29	352
Major-Lieutenant Commander	3,491	1,192	1,174	63	1,062
Captain-Lieutenant	12,377	4,302	2,573	190	5,312
1st Lieutenant-Lieutenant (Junior Grade)	5,416	1,912	1,173	190	2,141
2nd Lieutenant-Ensign	5,778	2,168	1,194	133	2,283
Warrant Officers (W-1 to W-4)	298	243	21	34	–
Total Officers	**28,665**	**10,230**	**6,553**	**648**	**11,234**
			Enlisted		
E-9	54	18	11	11	14
E-8	265	150	44	35	36
E-7	2,267	1,265	478	132	392
E-6	11,068	4,897	3,171	513	2,487
E-5	37,789	13,314	9,147	1,626	13,702
E-4	55,859	25,190	11,659	2,228	16,782
E-3	40,062	10,123	11,592	2,234	16,113
E-2	12,643	5,239	3,266	1,196	2,942
E-1	12,779	6,420	2,890	602	2,867
Total Enlisted	**172,786**	**66,616**	**42,258**	**8,577**	**55,335**
Cadets & Midshipmen	1,379	510	322	–	547
Grand Total	**202,830**	**77,356**	**49,133**	**9,225**	**67,116**

*Includes the newly re-established rank of Commodore.

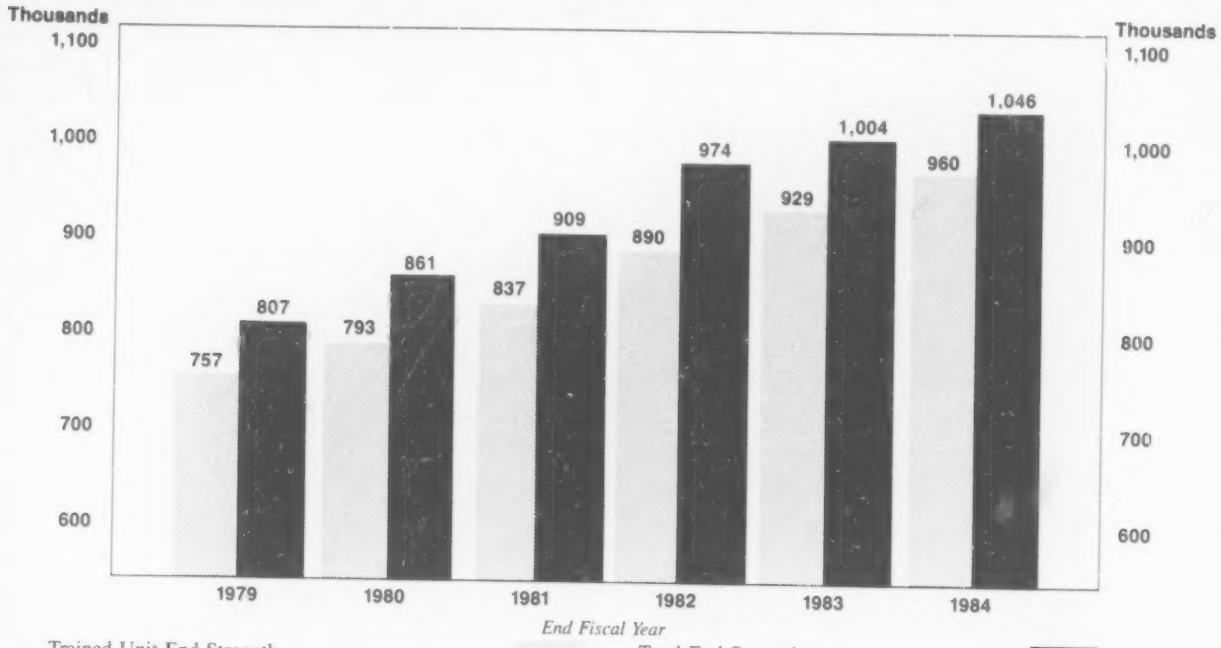
Source: Department of Defense, *Selected Manpower Statistics – FY 1984.*

Distribution of Dependents by Service & Type (As of September 30, 1984)

	Military Personnel (Excluding Cadets)		Dependents of Active Duty Military Personnel					
Component	Total Number	Number of Males	Total Number (All Types)	Spouses	Children	Parents & All Other	Number/ Military Male	Number/ Family Unit
Total Military	2,128,227	1,923,150	2,851,392	1,149,922	1,168,179	83,291	1.48	2.48
Officers	303,457	274,679	571,041	219,045	339,096	12,900	2.08	2.61
Enlisted	1,824,770	1,648,471	2,280,351	930,877	1,276,083	70,391	1.38	2.45
Total Army	776,951	698,748	1,136,587	409,598	651,865	75,124	1.63	2.77
Officers	107,414	97,653	206,933	74,523	121,001	11,409	2.12	2.78
Enlisted	669,537	601,095	929,654	335,075	530,864	63,715	1.55	2.77
Total Navy	560,196	511,333	646,853	279,715	363,314	3,824	1.27	2.31
Officers	69,380	62,303	120,239	48,416	71,350	473	1.93	2.48
Enlisted	490,816	449,030	526,614	231,299	291,964	3,351	1.17	2.28
Total Marines	195,382	186,989	198,062	83,752	113,574	736	1.06	2.36
Officers	20,335	19,718	39,968	15,164	24,725	79	2.03	2.64
Enlisted	175,027	167,271	158,094	68,588	88,849	657	.95	2.30
Total Air Force	595,698	526,080	869,890	376,857	489,426	3,607	1.65	2.31
Officers	106,308	95,005	203,901	80,942	122,020	939	2.15	2.52
Enlisted	489,390	431,075	665,989	295,915	367,406	2,668	1.54	2.25

Source: Department of Defense, *Selected Manpower Statistics – FY 1984.*

Selected Reserve Manpower Trends (End strength as of January 1, 1985)



Note: The Selected Reserve (SELRES) is the primary element of the Reserve forces organized and trained as units. The SELRES includes the Army National Guard, Army Reserve, Naval Reserve, Marine Corps Reserve, Air National Guard, and Air Force Reserve.
Source: Department of Defense, *Organization of the Joint Chiefs of Staff: Military Posture FY 86.*

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ALFRED M. **LEWIS** INCORPORATED

4th Annual Exchange Sales Report

The military exchange systems reported combined worldwide sales of some $13.5 billion in fiscal year 1984, contributing to a small annual sales advance of 1.54 percent.

Overall, sales certainly did not tally as high as many had originally hoped, but only the Coast Guard's resale network showed a worldwide exchange sales decline (4 percent). The Coast Guard's data also revealed a year-on CONUS-system sales retreat (6.12 percent.)

A strong U.S. dollar overseas was reportedly to blame for some military exchange ills. Millions in lost exchange sales, particularly in Germany, apparently moved off base with patrons who found they had more buying power with their bucks on the local economy.

It was the Navy's exchange system that posted the greatest worldwide percent sales gain (3.03 percent) over fiscal year 1983, on sales of some $1.5 billion. And the largest regional percent sales increase (6.46) belonged to the performance of the Marines' overseas exchange stores.

These and other facts and figures can be gleaned from this special *Interservice* report. It is hoped that the data on the pages that follow will deliver the information necessary to assist marketers in achieving even greater sales success in the future. ■

BY ALAN GOLDSTEIN

Alan Goldstein is director of information and research with the American Logistics Association. He's also editor of Interservice *magazine.*

The ALA is indebted to the Army and Air Force Exchange Service (AAFES), Navy Resale and Services Support Office (NAVRESSO), Marine Corps Exchange Service (MCES), and U.S. Coast Guard (Resale Programs Division) for their invaluable cooperation and assistance with providing the data necessary for this report.

All-Exchange Sales Summary—FY84

Totals

Store	FY 84 $ Sales: Retail	FY 84 $ Sales: Services & Other	FY 84 $ Sales: Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
AAFES (CONUS Totals)	1,927,032,000	713,009,000	2,640,041,000	2,623,088,000	0.65%
AAFES (Overseas Totals)	1,501,259,000	618,299,000	2,119,560,000	2,084,342,000	1.69%
AAFES (Worldwide Totals)	3,428,291,000	1,331,308,000	4,759,601,000	4,707,430,000	1.11%
Navy (CONUS)	763,095,828	326,489,000	1,090,587,871	1,052,212,532	3.65%
Navy (Overseas)	318,524,171	99,636,333	414,460,527	408,562,392	1.44%
Navy (Worldwide Totals)	1,081,619,999	426,125,333	1,505,048,398	1,460,774,924	3.03%
Marine Corps (CONUS Totals)	328,612,401	20,084,590	348,696,991	342,070,887	1.94%
Marine Corps (Overseas Totals)	52,496,052	6,815,388	59,311,440	55,714,020	6.46%
Marine Corps (Worldwide Totals)	381,108,453	26,899,978	408,008,431	397,784,907	2.57%
Coast Guard (CONUS Totals)	40,069,865	40,941,638	81,011,503	85,971,744	−6.12%
Coast Guard (Overseas Totals)	10,132,454	9,551,608	19,684,062	18,921,033	3.88%
Coast Guard (Worldwide Totals)	50,592,962	50,629,471	101,222,433	105,358,339	−4.00%
All-Exchange Totals *	**$9,882,834,185**	**$3,669,789,339**	**$13,547,233,656**	**$13,342,230,778**	**+1.54%**

* Data for Navy's NAVRESSO-managed ships store program are excluded from this report since the ships' stores follow a different calendar year operating cycle.

AAFES Exchange Sales—FY 84

Summary of Sales by Retail Department ($ In Thousands)

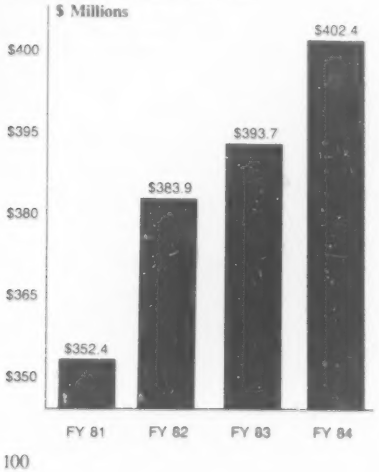
Department/Dept. Code	Domestic Sales	%	Overseas Sales	%	Mail Order Sales	%	Worldwide Sales	%	% Change 84/83
Automotive/01	64,880	3.1	34,685	2.6	76	.1	99,641	2.8	+.2
Beer & Sodas/23	111,259	5.3	72,344	5.4	–0–	–0–	183,602	5.2	+23.8
Boyswear/74	28,103	1.3	14,873	1.1	–0–	–0–	42,977	1.2	+8.6
Cleaning Supplies/83	32,806	1.5	15,890	1.2	86	.1	48,782	1.4	–1.9
Cosmetics & Fragrances/34	59,946	2.8	18,909	1.4	–0–	–0–	78,855	2.2	+14.1
Dinnerware & Flatware/80	11,554	.5	6,221	.5	3,395	5.5	21,170	.6	–.7
DPSC Merchandise/19	119,339	5.6	39,975	3.0	–0–	–0–	159,314	4.5	–2.2
Food & Juices/20	145,995	6.9	92,031	6.9	92	.1	238,117	6.8	–8.9
Footwear/77	82,604	3.9	36,733	2.8	466	.8	119,803	3.4	+2.1
Furniture & Rugs/86	21,814	1.0	27,755	2.1	2,433	3.9	52,002	1.5	+3.1
Giftware/82	25,452	1.2	20,008	1.5	5,872	9.4	51,333	1.5	+6.0
Girlswear/75	20,141	.9	12,654	1.0	11	–0–	32,806	.9	+.6
Hardware/87	52,867	2.5	13,259	1.0	126	.2	66,252	1.9	–.9
Health & Beauty Aids/30	132,800	6.3	67,285	5.1	389	.6	200,474	5.7	–.6
Home Entertainment/97	123,116	5.8	322,358	24.2	29,571	47.5	475,045	13.5	+.8
Infants' & Toddlers' Wear/76	30,905	1.5	17,534	1.3	5	–0–	48,445	1.4	+3.8
Jewelry/50	27,367	1.3	13,849	1.0	7,357	11.8	48,573	1.4	+4.7
Jewelry (Precious & Semiprecious)/56	24,498	1.2	18,481	1.4	1	–0–	42,979	1.2	+19.3
Kitchenware/81	32,379	1.5	14,545	1.1	638	1.0	47,562	1.4	–.5
Linens & Domestics/78	42,576	2.0	23,681	1.8	631	1.0	66,888	1.9	+4.8
Luggage/88	19,670	.9	8,399	.6	189	.3	28,258	.8	+1.0
Men's Furnishings/71	98,036	4.6	46,607	3.5	100	.2	144,743	4.1	+4.3
Men's Outerwear/70	51,851	2.4	30,995	2.3	91	.1	82,937	2.4	+4.1
Military Wear/40	47,840	2.3	11,851	.9	–0–	–0–	59,690	1.7	+2.6
Outdoor Living/89	57,636	2.7	8,702	.7	68	.1	66,396	1.9	+4.6
Photo Finishing/92	16,252	.8	2,993	.2	–0–	–0–	19,245	.6	+5.0
Photography & Optical/93	56,888	2.7	49,992	3.8	4,087	6.6	110,967	3.2	–3.0
Recorded Sound & Video/98	26,733	1.3	37,218	2.8	549	.9	64,501	1.8	–1.0
Sporting Goods & Camping Supplies/91	40,264	1.9	15,467	1.2	1,243	2.0	56,974	1.6	+1.8
Stationery/60	119,408	5.6	45,731	3.4	980	1.6	116,119	4.7	+1.6
Tobacco Products/10	105,013	5.0	31,214	2.3	37	.1	136,264	3.9	–2.7
Toys, Games & Bicycles/95	43,671	2.1	33,910	2.5	927	1.5	78,509	2.2	+11.3
Traffic & Major Appliances/85	72,072	3.4	42,775	3.2	1,452	2.3	116,298	3.3	+2.7
Watches/51	24,063	1.1	11,749	.9	(3)	–0–	35,809	1.0	–.2
Women's Furnishings/73	60,102	2.8	19,280	1.4	602	1.0	79,983	2.3	+1.4
Women's Outerwear/72	72,592	3.4	39,432	3.0	338	.5	112,362	3.2	+5.2
Yardage & Sewing Notions/79	18,526	.9	12,079	.9	487	.8	31,093	.9	–8.7
Retail Department Totals	**$2,121,008**	**100.0%**	**$1,331,464**	**100.0%**	**$62,296**	**100.0%**	**$3,514,768**	**100.0%**	**+2.0**

AAFES Exchange Sales—FY 84 (Continental U.S.)

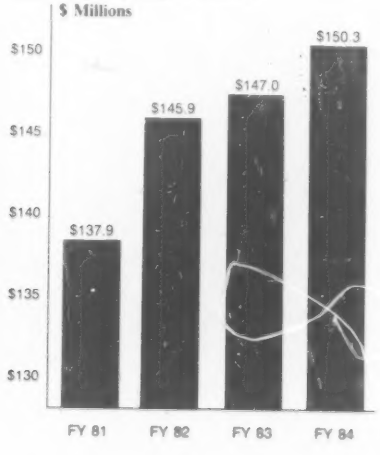
Alamo Region (ALER)

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Altus AFB, OK	4,601,000	1,528,000	6,129,000	5,849,000	4.79%
Barksdale AFB, LA	17,882,000	4,911,000	22,793,000	22,126,000	2.93%
Bergstrom AFB, TX	15,228,000	3,595,000	18,823,000	18,713,000	0.58%
Blytheville AFB, AR	5,047,000	1,636,000	6,683,000	6,492,000	2.86%
Brooks AFB, TX	1,871,000	973,000	2,844,000	2,858,000	−0.49%
Cannon AFB, NM	5,877,000	2,359,000	8,236,000	8,971,000	−8.92%
Carswell AFB, TX	24,887,000	5,819,000	30,706,000	29,197,000	4.91%
Dyess AFB, TX	7,830,000	2,933,000	10,763,000	10,511,000	2.34%
England AFB, LA	5,956,000	1,915,000	7,871,000	8,582,000	−9.03%
Fort Bliss, TX	33,492,000	14,226,000	47,718,000	46,339,000	2.89%
Fort Chaffee, AR	2,293,000	273,000	2,566,000	2,786,000	−8.57%
Fort Hood, TX	50,077,000	24,274,000	74,351,000	72,386,000	2.64%
Fort Polk, LA	22,736,000	11,093,000	33,829,000	33,313,000	1.53%
Fort Sam Houston, TX	39,064,000	8,482,000	47,546,000	47,603,000	−0.12%
Fort Sill, OK	24,351,000	13,450,000	37,801,000	34,799,000	7.94%
Good Fellow AFB, TX	3,972,000	1,354,000	5,326,000	5,623,000	−5.58%
Holloman AFB, NM	7,390,000	3,401,000	10,791,000	10,453,000	3.13%
Kirtland AFB, NM	14,124,000	3,818,000	17,942,000	17,623,000	1.78%
Lackland AFB, TX	42,713,000	17,777,000	60,490,000	58,891,000	2.64%
Laughlin AFB, TX	3,016,000	1,496,000	4,512,000	4,831,000	−7.07%
Little Rock AFB, AR	13,226,000	4,389,000	17,615,000	17,711,000	−0.54%
Randolph AFB, TX	16,182,000	4,899,000	21,081,000	21,526,000	−2.11%
Reese AFB, TX	4,048,000	1,488,000	5,536,000	5,526,000	0.18%
Sheppard AFB, TX	17,014,000	6,988,000	24,002,000	21,722,000	9.50%
Tinker AFB, OK	15,105,000	4,339,000	19,444,000	19,141,000	1.56%
Vance AFB, OK	2,179,000	805,000	2,984,000	2,874,000	3.69%
White Sands, NM	2,219,000	2,062,000	4,281,000	4,258,000	0.54%
ALER Totals	**$402,381,000**	**$150,283,000**	**$552,664,000**	**$540,704,000**	**+2.21%**

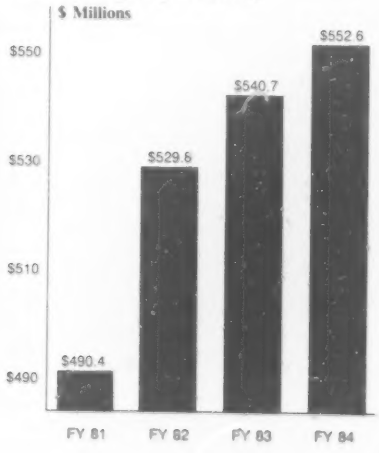
4-Year Retail Sales Summary
Alamo Exchange Region (AAFES)



4-Year Services Sales Summary
Alamo Exchange Region (AAFES)



4-Year Total Sales Summary
Alamo Exchange Region (AAFES)

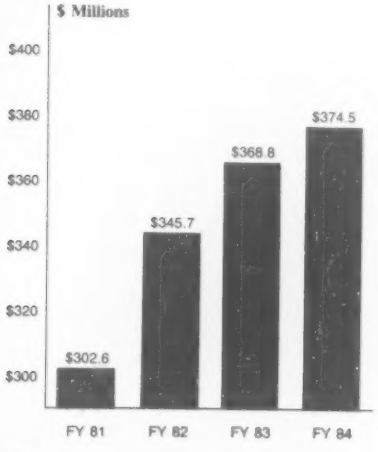


AAFES Exchange Sales—FY 84

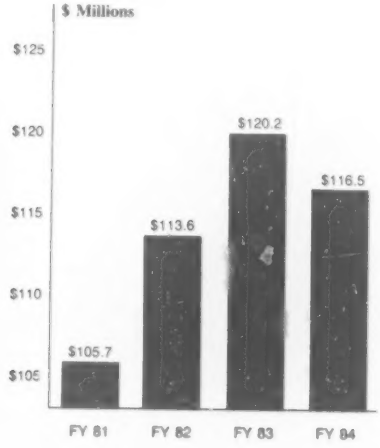
Capitol Region (CPER)

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Aberdeen Proving Grounds, MD	11,964,000	4,220,000	16,184,000	15,638,000	3.37%
Andrews AFB, D.C.	29,751,000	8,280,000	38,031,000	36,928,000	2.90%
Bolling AFB, D.C.	15,525,000	5,337,000	20,862,000	19,681,000	5.66%
Cameron Station, VA	22,622,000	2,961,000	25,583,000	24,606,000	3.82%
Carlisle Barracks, PA	11,383,000	2,020,000	13,403,000	13,390,000	0.10%
Dover AFB, DE	9,258,000	3,661,000	12,919,000	13,481,000	−4.35%
Fort Belvoir, VA	29,434,000	10,406,000	39,840,000	37,535,000	5.79%
Fort Devens, MA	25,172,000	7,452,000	32,624,000	31,571,000	3.23%
Fort Dix, NJ	41,274,000	12,363,000	53,637,000	56,720,000	−5.75%
Fort Drum, NY	7,496,000	1,746,000	9,242,000	8,401,000	9.10%
Fort Eustis, VA	15,871,000	6,753,000	22,624,000	22,017,000	2.68%
Fort Hamilton, NY	8,684,000	1,732,000	10,416,000	10,760,000	−3.30%
Fort Lee, VA	19,166,000	8,622,000	27,788,000	26,970,000	2.94%
Fort Meade, MD	27,008,000	7,320,000	34,328,000	34,536,000	−0.61%
Fort Monmouth, NJ	7,792,000	2,050,000	9,842,000	10,132,000	−2.95%
Fort Myer/Fort McNair, VA	13,335,000	6,302,000	19,637,000	18,032,000	8.17%
Griffiss AFB, NY	10,829,000	3,161,000	13,990,000	14,972,000	−7.02%
Langley AFB, VA	19,913,000	8,234,000	28,147,000	28,842,000	−2.47%
Loring AFB, ME	4,534,000	2,229,000	6,763,000	6,808,000	−0.67%
Pease AFB, NH	12,859,000	2,648,000	15,507,000	14,430,000	6.95%
Plattsburgh AFB, NY	6,534,000	2,125,000	8,659,000	8,498,000	1.86%
U.S. Military Academy, NY	8,973,000	3,068,000	12,041,000	11,969,000	0.60%
Walter Reed AMC, D.C.	6,221,000	3,450,000	9,671,000	11,782,000	−21.83%
Westover AFB, MA	8,865,000	407,000	9,272,000	9,345,000	−0.79%
CPER Totals	**$374,463,000**	**$116,547,000**	**$491,010,000**	**$487,044,000**	**+0.81%**

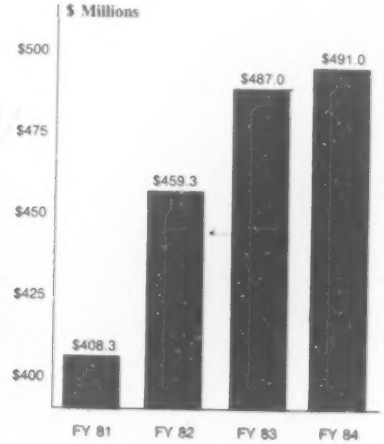
4-Year Retail Sales Summary
Capitol Exchange Region (AAFES)



4-Year Services Sales Summary
Capitol Exchange Region (AAFES)



4-Year Total Sales Summary
Capitol Exchange Region (AAFES)

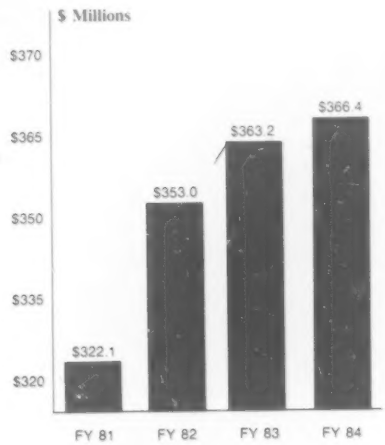


AAFES Exchange Sales—FY 84

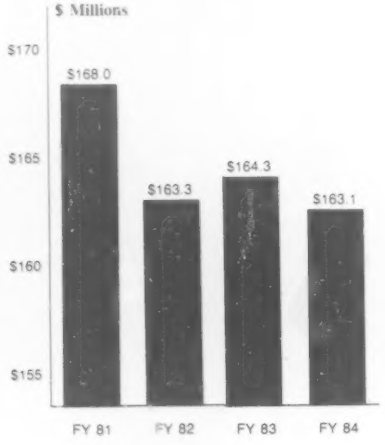
Golden Gate Region (GGER)

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Beale AFB, CA	8,681,000	4,487,000	13,168,000	13,288,000	−0.90%
Castle AFB, CA	9,893,000	3,851,000	13,744,000	13,809,000	−0.47%
Davis-Monthan AFB, AZ	14,723,000	4,191,000	18,914,000	19,238,000	−1.68%
Edwards AFB, CA	9,352,000	6,077,000	15,429,000	13,561,000	13.77%
Fairchild AFB, WA	10,376,000	2,811,000	13,187,000	13,527,000	−2.51%
Fort Huachuca, AZ	11,470,000	4,967,000	16,437,000	16,209,000	1.41%
Fort Hunter Liggett, CA	2,212,000	1,395,000	3,607,000	3,499,000	3.09%
Fort Irwin, CA	4,941,000	2,552,000	7,493,000	6,914,000	8.37%
Fort Lewis, WA	67,561,000	30,596,000	98,157,000	100,548,000	−2.38%
Fort Ord, CA	33,922,000	19,926,000	53,848,000	51,108,000	5.36%
George AFB, CA	8,761,000	4,425,000	13,186,000	13,312,000	−0.95%
Hill AFB, UT	12,253,000	3,195,000	15,448,000	13,775,000	12.15%
Los Angeles AFS, CA	12,901,000	3,552,000	16,453,000	8,831,000	86.31%
Luke AFB, AZ	20,780,000	6,695,000	27,475,000	16,948,000	62.11%
Malmstrom AFB, MT	4,984,000	1,876,000	6,860,000	7,278,000	0.00%
Mather AFB, CA	29,231,000	10,641,000	39,872,000	26,343,000	51.36%
Mountain Home AFB, ID	7,493,000	2,526,000	10,019,000	9,843,000	1.79%
Nellis AFB, NV	16,929,000	6,608,000	23,537,000	23,383,000	0.66%
Norton AFB, CA	27,416,000	13,784,000	41,200,000	22,401,000	83.92%
Presidio of San Francisco, CA	18,704,000	8,722,000	27,426,000	28,113,000	0.00%
Travis AFB, CA	21,375,000	10,960,000	32,335,000	33,966,000	0.00%
Vandenberg AFB, CA	12,032,000	8,574,000	20,606,000	19,070,000	8.05%
Yuma Proving Ground, AZ	411,000	751,000	1,162,000	1,161,000	0.09%
GGER Totals	**$366,401,000**	**$163,162,000**	**$529,563,000**	**$476,125,000**	**+11.22%**

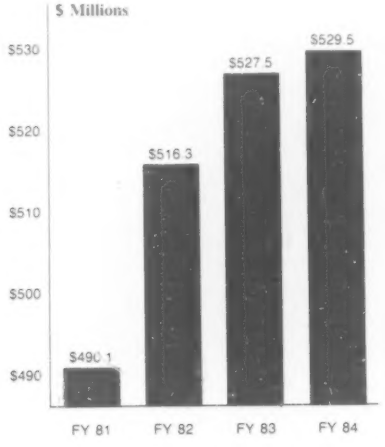
4-Year Retail Sales Summary
Golden Gate Exchange Region (AAFES)



4-Year Services Sales Summary
Golden Gate Exchange Region (AAFES)



4-Year Total Sales Summary
Golden Gate Exchange Region (AAFES)

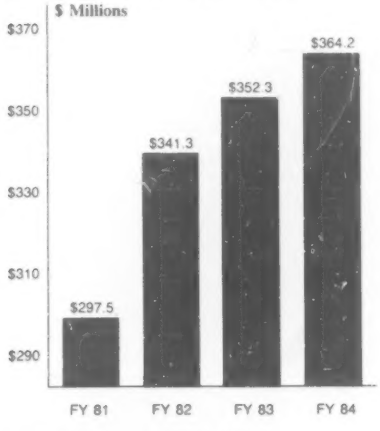


AAFES Exchange Sales—FY 84

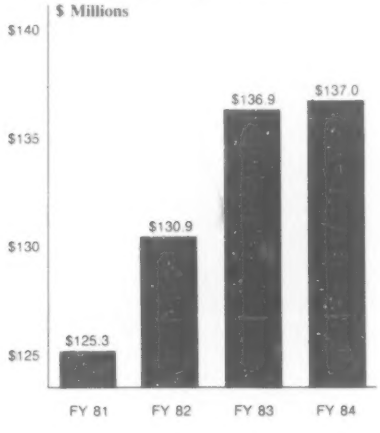
Ohio Valley Region (OVER)

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Chanute AFB, IL	13,608,000	6,368,000	19,976,000	18,396,000	8.59%
Denver Exchange (Lowry AFB), CO	29,448,000	8,731,000	38,179,000	37,451,000	1.94%
Ellsworth AFB, SD	6,696,000	2,795,000	9,491,000	9,247,000	2.64%
Fort Benjamin Harrison, IN	11,798,000	4,173,000	15,971,000	15,343,000	4.09%
Fort Campbell, KY	31,464,000	14,069,000	45,533,000	44,552,000	2.20%
Fort Carson, CO	19,517,000	10,642,000	30,159,000	28,510,000	5.78%
Fort Knox, KY	32,134,000	16,076,000	48,210,000	48,401,000	−0.39%
Fort Leavenworth, KS	9,395,000	3,040,000	12,435,000	11,659,000	6.66%
Fort Leonard Wood, MO	21,165,000	11,378,000	32,543,000	31,668,000	2.76%
Fort McCoy, WI	10,327,000	1,011,000	11,338,000	11,740,000	−3.42%
Fort Riley,KS	17,534,000	10,497,000	28,031,000	29,007,000	−3.36%
Fort Sheridan, IL	7,186,000	1,110,000	8,296,000	8,767,000	−5.37%
Francis E. Warren AFB, WY	3,965,000	1,645,000	5,610,000	5,447,000	2.99%
Grand Forks AFB, ND	10,097,000	3,821,000	13,918,000	13,789,000	0.94%
Grissom AFB, IN	4,358,000	2,254,000	6,612,000	6,316,000	4.69%
K.I. Sawyer AFB, MI	6,020,000	3,261,000	9,281,000	9,295,000	−0.15%
McConnell AFB, KS	5,398,000	1,912,000	7,310,000	7,100,000	2.96%
Minot AFB, ND	8,049,000	4,118,000	12,167,000	11,717,000	3.84%
Nashville (Tullahoma), TN	4,026,000	6,000	4,032,000	3,998,000	0.85%
Oakdale ADS, PA	4,789,000	168,000	4,957,000	5,044,000	−1.72%
Offutt AFB, NE	19,938,000	6,559,000	26,497,000	26,666,000	−0.63%
Peterson Field (Colo. Springs), CO	20,153,000	6,333,000	26,486,000	24,488,000	8.16%
Rickenbacker AFB, OH	5,180,000	540,000	5,720,000	6,705,000	−14.69%
Scott AFB, IL	19,846,000	7,175,000	27,021,000	25,288,000	6.85%
Selfridge ANG, MI	7,348,000	1,326,000	8,674,000	7,323,000	18.45%
Whiteman AFB, MO	5,374,000	1,698,000	7,072,000	7,136,000	−0.90%
Wright-Patterson AFB, OH	21,814,000	4,449,000	26,263,000	25,220,000	4.14%
Wurtsmith AFB, MI	7,630,000	1,855,000	9,485,000	8,881,000	6.80%
OVER Totals	**$364,257,000**	**$137,010,000**	**$501,267,000**	**$489,154,000**	**+2.48%**

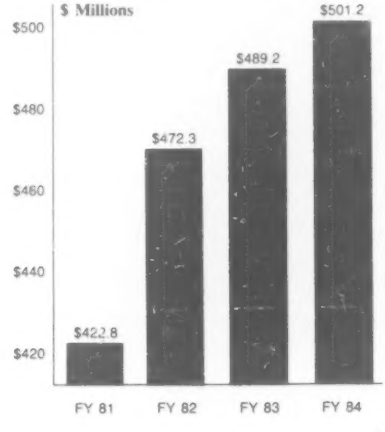
4-Year Retail Summary
Ohio Valley Exchange Region (AAFES)



4-Year Total Sales Summary
Ohio Valley Exchange Region (AAFES)



4-Year Services Sales Summary
Ohio Valley Exchange Region (AAFES)

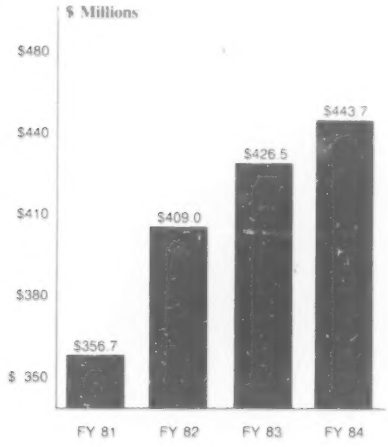


AAFES Exchange Sales—FY 84

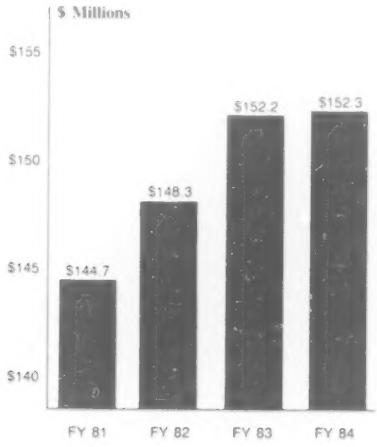
Southeast Region (SEER)

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Charleston AFB, SC	10,904,000	3,029,000	13,933,000	12,664,000	10.02%
Columbus AFB, MS	4,521,000	1,837,000	6,358,000	6,232,000	2.02%
Eglin AFB, FL	21,420,000	8,521,000	29,941,000	29,740,000	0.68%
Fort Benning, GA	42,200,000	18,573,000	60,773,000	59,497,000	2.14%
Fort Bragg, NC	48,972,000	24,773,000	73,745,000	71,486,000	3.16%
Fort Gordon, GA	22,593,000	12,829,000	35,422,000	33,350,000	6.21%
Fort Jackson, SC	34,248,000	7,717,000	41,965,000	43,462,000	−3.44%
Fort McClellan, AL	20,270,000	6,240,000	26,510,000	24,398,000	8.66%
Fort McPherson, GA	15,101,000	2,825,000	17,926,000	17,278,000	3.75%
Fort Rucker, AL	15,566,000	6,227,000	21,793,000	21,994,000	−0.91%
Fort Stewart, GA	24,795,000	8,873,000	33,668,000	31,970,000	5.31%
Homestead AFB, FL	17,117,000	4,720,000	21,837,000	22,173,000	−1.52%
Hurlburt Field, FL	3,991,000	1,517,000	5,508,000	4,001,000	37.67%
Keesler AFB, MS	30,988,000	9,523,000	40,511,000	41,331,000	−1.98%
MacDill AFB, FL	26,495,000	6,382,000	32,877,000	33,425,000	−1.64%
Maxwell AFB, AL	19,230,000	5,294,000	24,524,000	23,477,000	4.46%
Moody AFB, GA	5,067,000	1,833,000	6,900,000	6,830,000	1.02%
Myrtle Beach AFB, SC	8,070,000	2,687,000	10,757,000	9,906,000	8.59%
Patrick AFB, FL	18,732,000	3,483,000	22,215,000	21,037,000	5.60%
Redstone Arsenal, AL	13,975,000	3,189,000	17,164,000	15,233,000	12.68%
Robins AFB, GA	10,838,000	2,670,000	13,508,000	13,282,000	1.70%
Seymour Johnson AFB, NC	8,049,000	2,701,000	10,750,000	10,166,000	5.74%
Shaw AFB, SC	10,940,000	3,325,000	14,265,000	12,846,000	11.05%
Tyndall AFB, FL	9,627,000	3,578,000	13,205,000	12,905,000	2.32%
SEER Totals	**$443,709,000**	**$152,346,000**	**$596,055,000**	**$578,683,000**	**+3.00%**

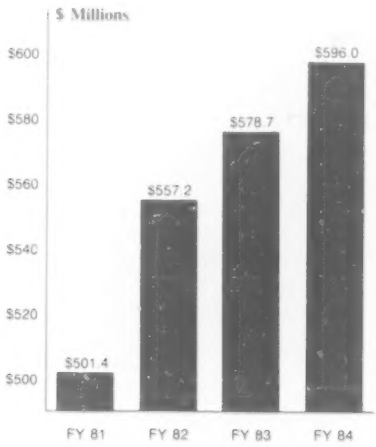
4-Year Retail Sales Summary
Southeast Exchange Region (AAFES)



4-Year Services Sales Summary
Southeast Exchange Region (AAFES)



4-Year Total Sales Summary
Southeast Exchange Region (AAFES)



AAFES Exchange Sales—FY 84

Totals

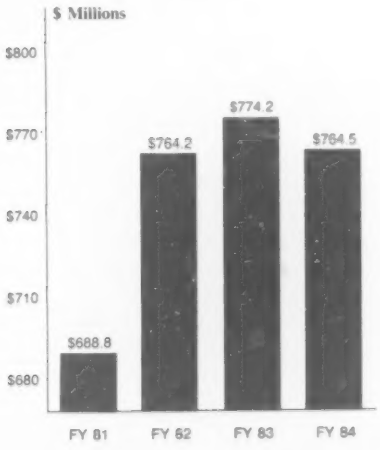
	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
CONUS Totals	**$1,927,032,000**	**$713,009,000**	**2,640,041,000**	**$2,623,088,000**	**+0.65%**

Europe

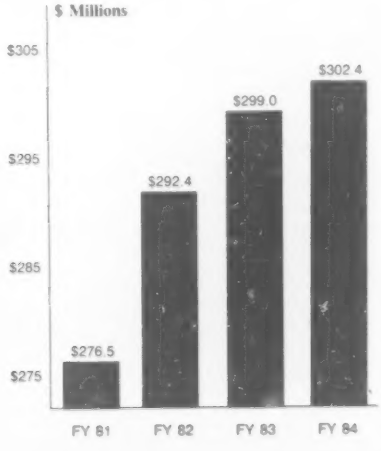
Germany

Exchange Area	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Frankfurt Area (FRAX)	202,777,000	79,765,000	282,542,000	283,974,000	−0.50%
Kaiserslauten Area (KAAX)	168,041,000	65,657,000	233,698,000	238,714,000	−2.10%
Nuremberg Area (NUAX)	134,442,000	57,956,000	192,398,000	196,251,000	−1.96%
Spangdahlem Area (SAAX)	119,321,000	38,893,000	158,214,000	154,936,000	2.12%
Stuttgart Area (SGAX)	139,936,000	60,184,000	200,120,000	199,363,000	0.38%
Germany Exchanges' Totals	**$764,517,000**	**$302,455,000**	**$1,066,972,000**	**$1,073,238,000**	**−0.58%**

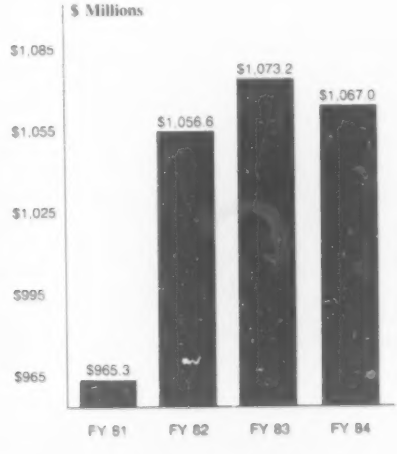
4-Year Retail Sales Summary
Germany Exchanges (AAFES)



4-Year Services Sales Summary
Germany Exchanges (AAFES)



4-Year Total Sales Summary
Germany Exchanges (AAFES)



Germany—Other

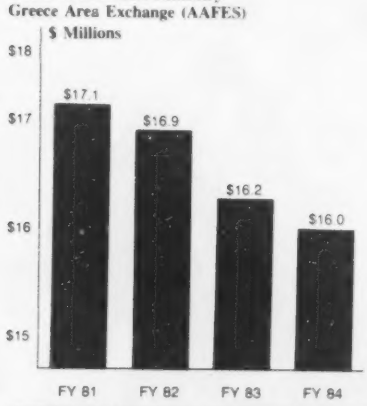
	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Giessen Depot	$92,000	−0−	$92,000	$61,000	+50.82%
Gruenstadt Depot	$1,835,000	−0−	$1,835,000	$1,937,000	−5.27%

Greece

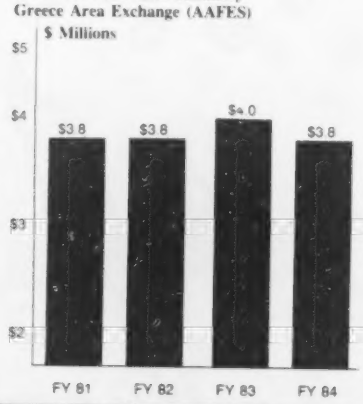
Exchange Area	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Greece Area Exchange (GRAX)	$16,011,000	$3,814,000	$19,825,000	$20,219,000	−1.95%

AAFES Exchange Sales—FY 84

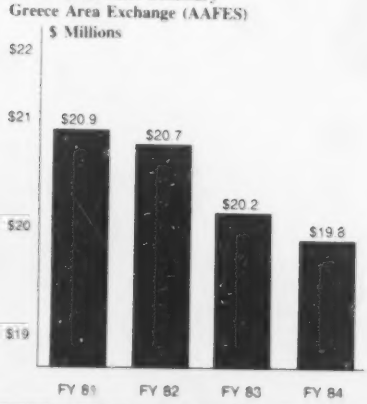
4-Year Retail Sales Summary
Greece Area Exchange (AAFES)



4-Year Services Sales Summary
Greece Area Exchange (AAFES)



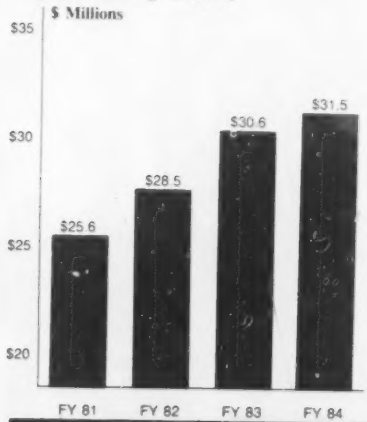
4-Year Total Sales Summary
Greece Area Exchange (AAFES)



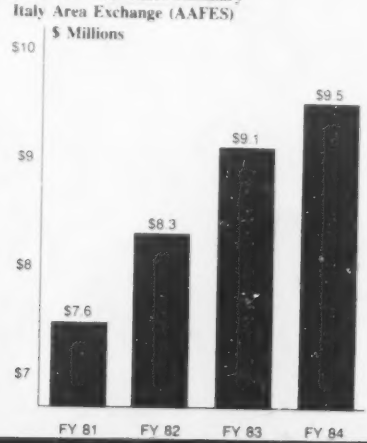
Italy

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Italy Area (ITAX)	$31,484,000	$9,531,000	$41,015,000	$39,734,000	+3.22%

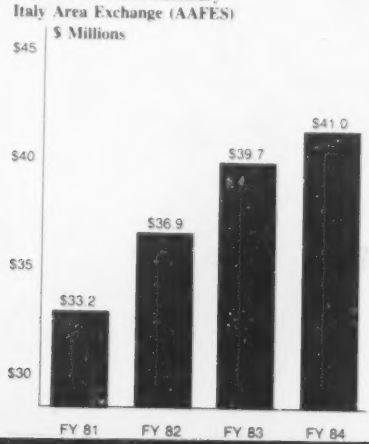
4-Year Retail Sales Summary
Italy Area Exchange (AAFES)



4-Year Services Sales Summary
Italy Area Exchange (AAFES)



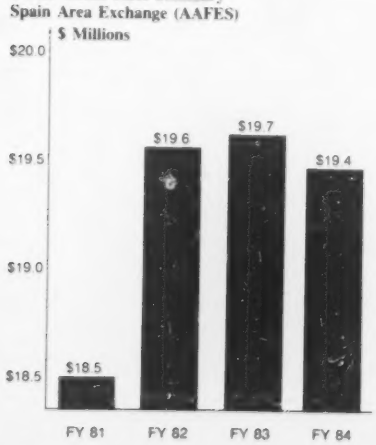
4-Year Total Sales Summary
Italy Area Exchange (AAFES)



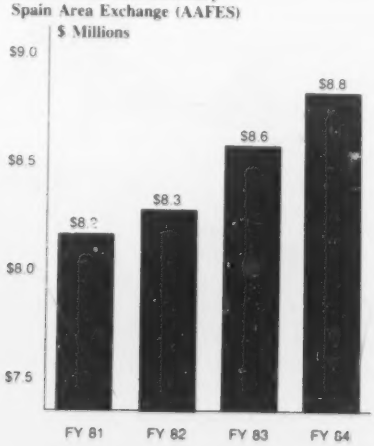
Spain

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Spain Area (SPAX)	$19,386,000	$8,843,000	$28,229,000	$28,327,000	−0.35%

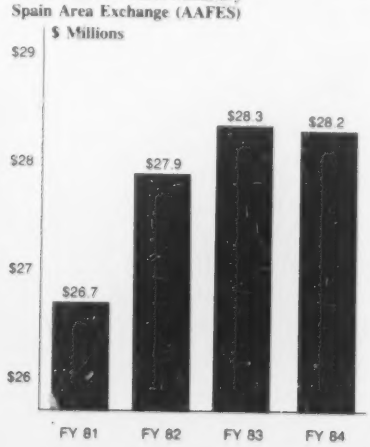
4-Year Retail Sales Summary
Spain Area Exchange (AAFES)



4-Year Total Sales Summary
Spain Area Exchange (AAFES)



4-Year Services Sales Summary
Spain Area Exchange (AAFES)

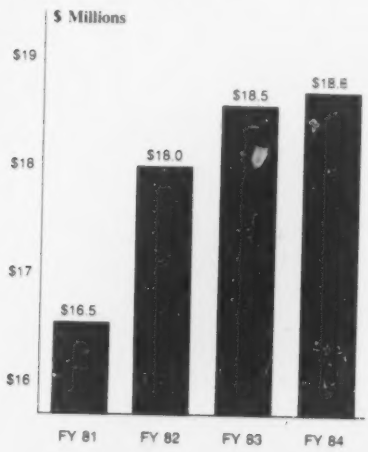


AAFES Exchange Sales—FY 84

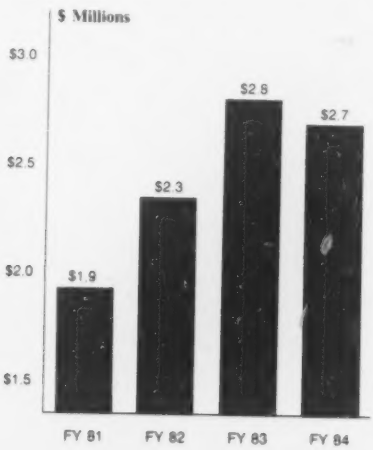
Turkey

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Turkey Area (TUAX)	$18,644,000	$2,695,000	$21,339,000	$20,997,000	+1.63%

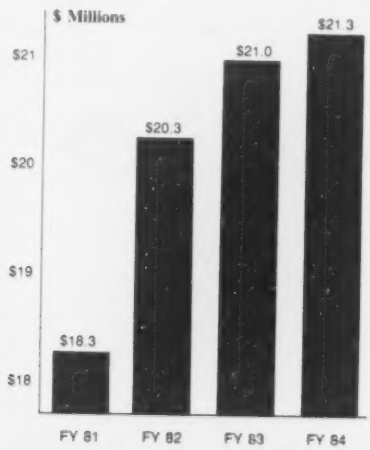
4-Year Retail Sales Summary
Turkey Area Exchange (AAFES)



4-Year Services Sales Summary
Turkey Area Exchange (AAFES)



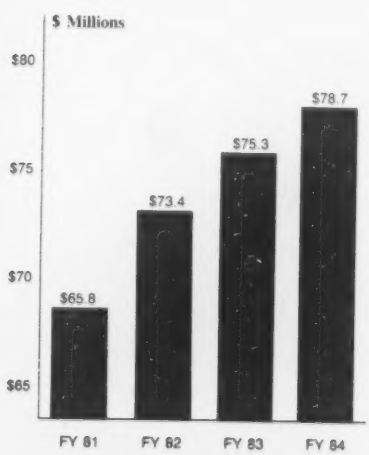
4-Year Total Sales Summary
Turkey Area Exchange (AAFES)



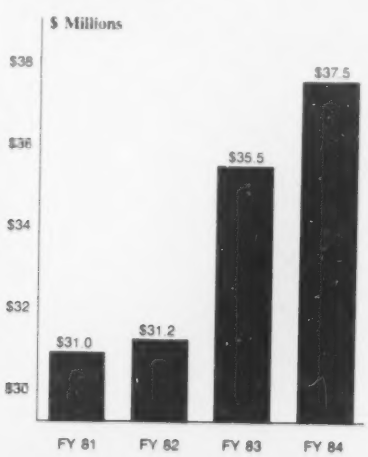
United Kingdom

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
United Kingdom Area (UKAX)	$78,665,000	$37,471,000	$116,136,000	$110,727,000	+4.88%

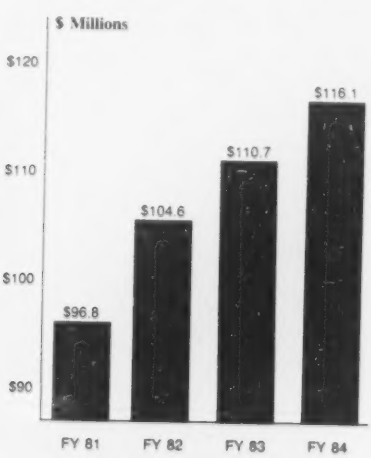
4-Year Retail Sales Summary
U.K. Area Exchange (AAFES)



4-Year Services Sales Summary
U.K. Area Exchange (AAFES)



4-Year Total Sales Summary
U.K. Area Exchange (AAFES)



Totals

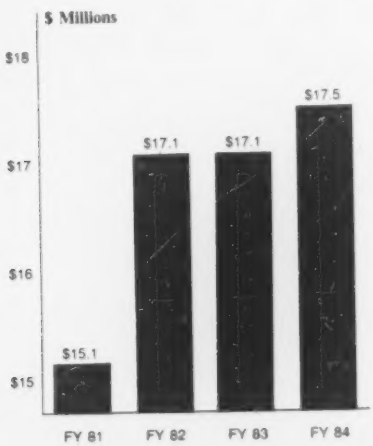
	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
AAFES-Europe Totals	$930,634,000	$364,809,000	$1,295,443,000	$1,295,240,000	+0.02%

AAFES Exchange Sales—FY 84 (Pacific)

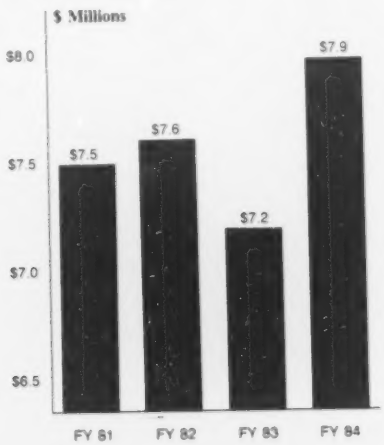
Guam

Exchange Area	FY 84 $ Sales: Retail	FY 84 $ Sales: Services & Other	FY 84 $ Sales: Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Guam Area (GUAX)	$17,554,000	$7,954,000	$25,508,000	$24,260,000	+5.14%

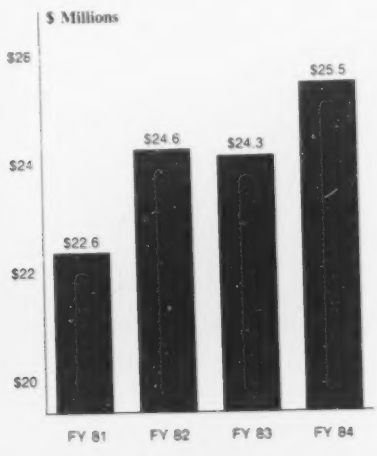
4-Year Retail Sales Summary
Guam Area Exchange (AAFES)



4-Year Services Sales Summary
Guam Area Exchange (AAFES)



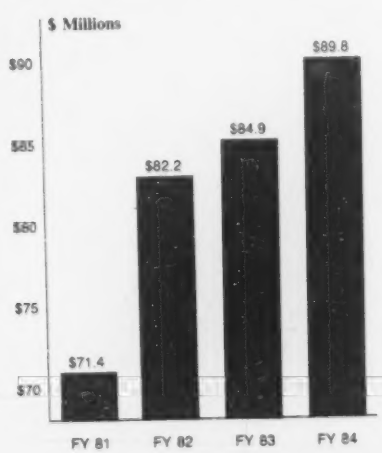
4-Year Total Sales Summary
Guam Area Exchange (AAFES)



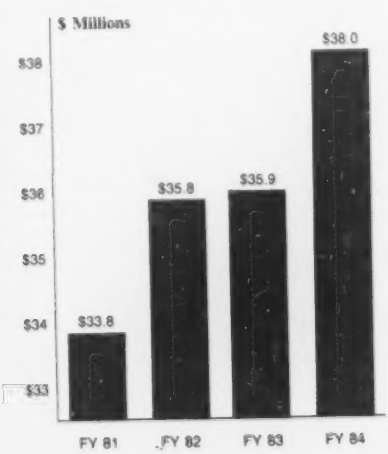
Hawaii

Exchange Area	FY 84 $ Sales: Retail	FY 84 $ Sales: Services & Other	FY 84 $ Sales: Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Hawaii Area (HAAX)	$89,812,000	$38,043,000	$127,855,000	$120,875,000	+5.77%

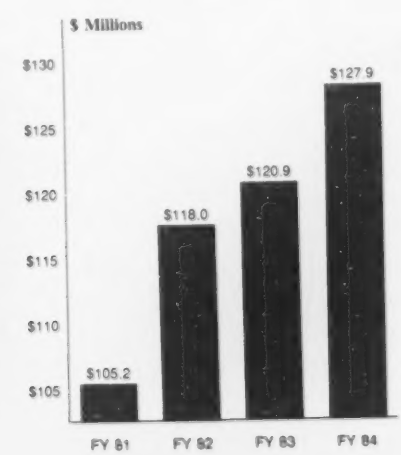
4-Year Retail Sales Summary
Hawaii Area Exchange (AAFES)



4-Year Services Sales Summary
Hawaii Area Exchange (AAFES)



4-Year Total Sales Summary
Hawaii Area Exchange (AAFES)

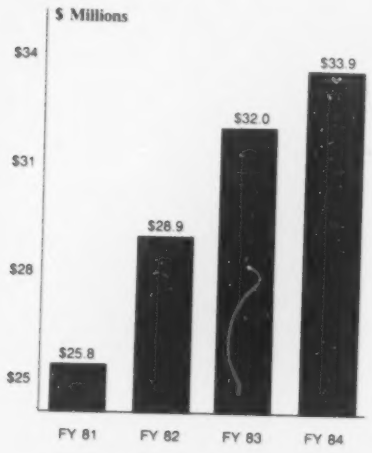


Japan

Exchange Area	FY 84 $ Sales: Retail	FY 84 $ Sales: Services & Other	FY 84 $ Sales: Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Japan Area (JAAX)	$33,953,000	$18,946,000	$52,899,000	$50,191,000	+5.40%

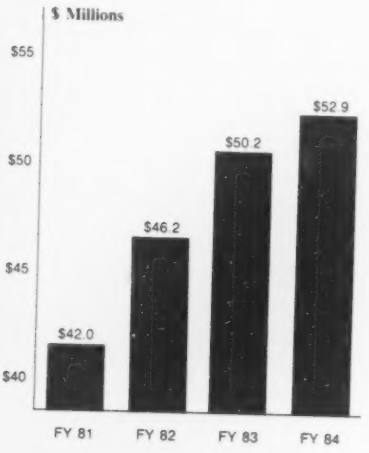
AAFES Exchange Sales—FY 84

4-Year Retail Sales Summary
Japan Area Exchange (AAFES)



4-Year Services Sales Summary
Japan Area Exchange (AAFES)

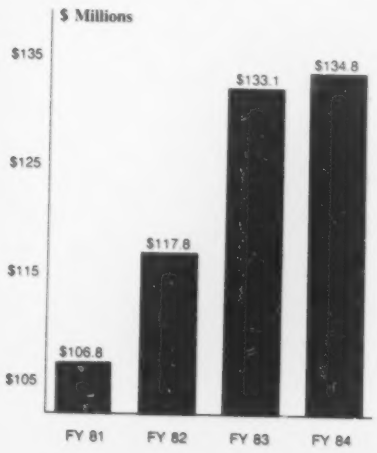
4-Year Total Sales Summary
Japan Area Exchange (AAFES)



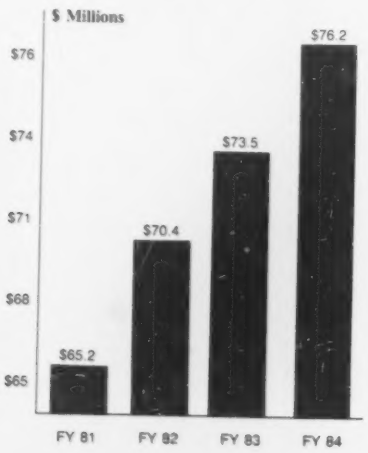
Korea

Exchange Area	FY 84 $ Sales: Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Korea Area (KOAX)	$134,798,000	$76,212,000	$211,010,000	$206,577,000	+2.15%

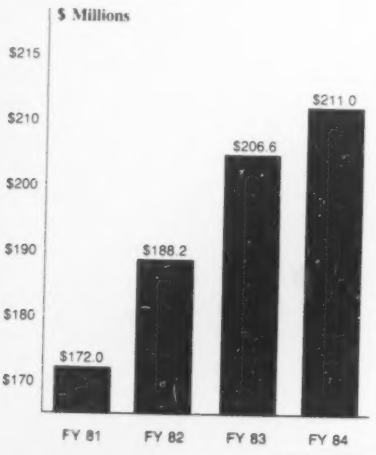
4-Year Retail Sales Summary
Korea Area Exchange (AAFES)



4-Year Services Sales Summary
Korea Area Exchange (AAFES)



4-Year Total Sales Summary
Korea Area Exchange (AAFES)

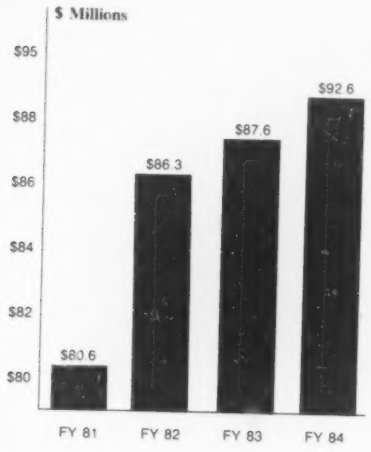


Okinawa

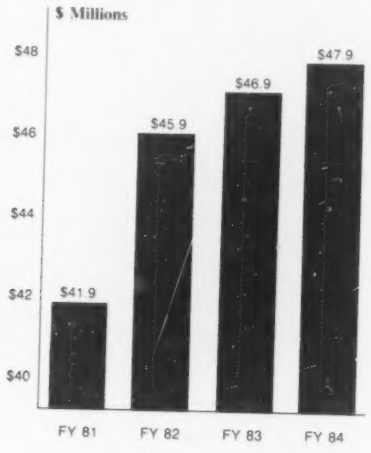
Exchange Area	FY 84 $ Sales: Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Okinawa Area	$92,557,000	$47,857,000	$140,414,000	$134,468,000	+4.42%

AAFES Exchange Sales—FY 84

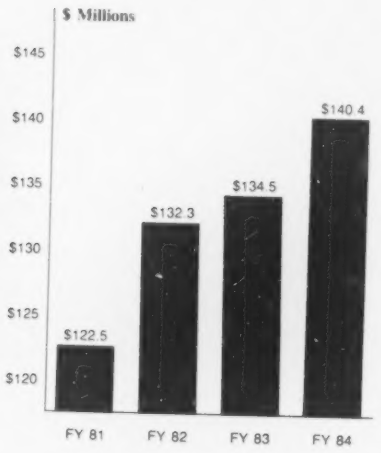
4-Year Retail Sales Summary
Okinawa Area Exchange (AAFES)



4-Year Services Sales Summary
Okinawa Area Exchange (AAFES)



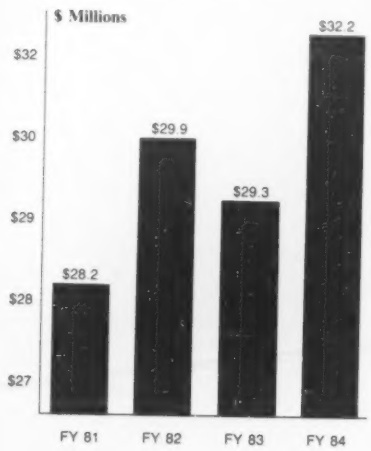
4-Year Total Sales Summary
Okinawa Area Exchange (AAFES)



Philippines

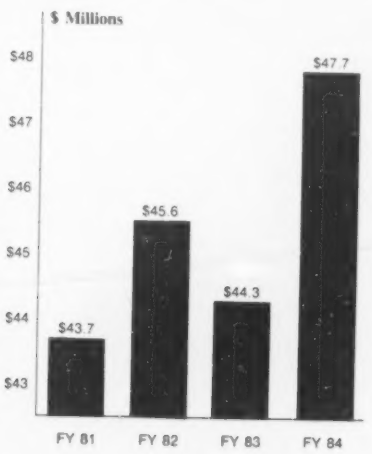
Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Philippines Area (PHAX)	$32,157,000	$15,502,000	$47,659,000	$44,300,000	+7.58%

4-Year Retail Sales Summary
Philippines Area Exchange (AAFES)



4-Year Services Sales Summary
Philippines Area Exchange (AAFES)

4-Year Total Sales Summary
Philippines Area Exchange (AAFES)



Totals

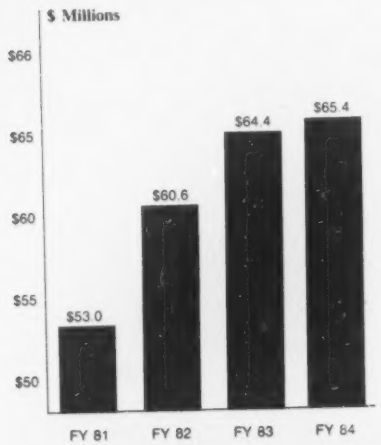
	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
AAFES-Pacific Totals	**$400,832,000**	**$204,514,000**	**$605,345,000**	**$580,671,000**	**+4.25%**

AAFES Exchange Sales—FY 84 (Other—Overseas)

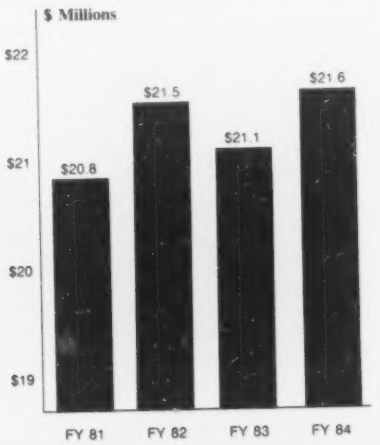
Alaska Area (AKAX)

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Eielson AFB (Fairbanks)	–0–	–0–	–0–	13,328,000	0.00%
Elmendorf AFB (Anchorage)	39,927,000	14,328,000	54,255,000	35,883,000	51.20%
Fort Greely (Big Delta)	2,410,000	953,000	3,363,000	3,298,000	1.97%
Fort Richardson (Anchorage)	–0–	–0–	–0–	17,005,000	0.00%
Fort Wainwright (Fairbanks)	20,580,000	6,051,000	26,631,000	13,638,000	95.27%
"Remote Sites"	2,524,000	235,000	2,759,000	3,311,000	–16.67%
AKAX Totals	**$65,441,000**	**$21,567,000**	**$87,008,000**	**$86,463,000**	**+0.63%**

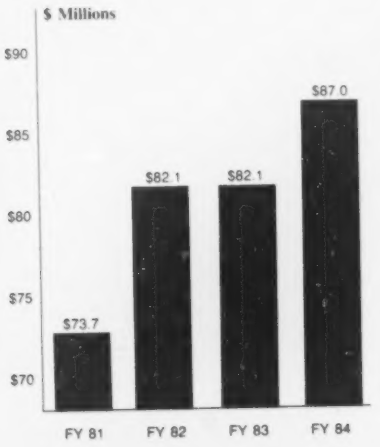
4-Year Retail Sales Summary
Alaska Area Exchange (AAFES)



4-Year Services Sales Summary
Alaska Area Exchange (AAFES)



4-Year Total Sales Summary
Alaska Area Exchange (AAFES)



Azores

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Azores	$7,398,000	$1,907,000	$9,305,000	$8,784,000	+5.93%

Greenland

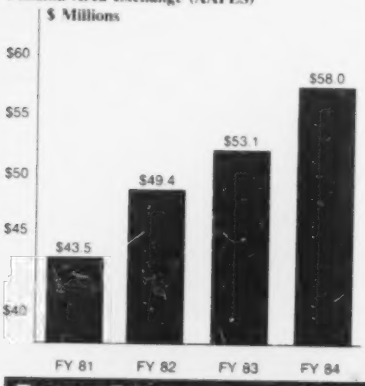
Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Sondrestrom AB	$1,277,000	$44,000	$1,321,000	$1,508,000	–12.40%
Thule AB	$2,954,000	$61,000	$3,015,000	$3,016,000	–0.03%

Panama Area (PAAX)

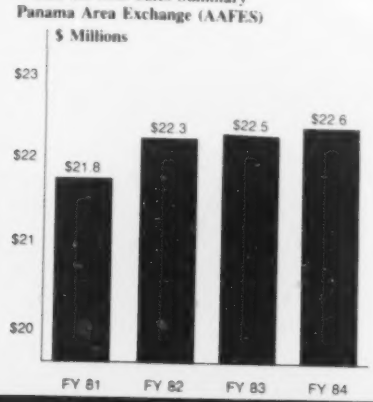
Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Panama Area (PAAX)	$57,983,000	$22,565,000	$80,548,000	$75,665,000	+6.45%

AAFES Exchange Sales—FY 84

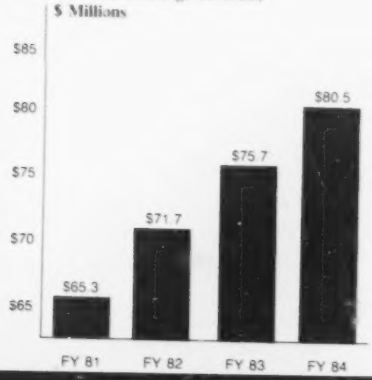
4-Year Retail Sales Summary
Panama Area Exchange (AAFES)



4-Year Services Sales Summary
Panama Area Exchange (AAFES)



4-Year Total Sales Summary
Panama Area Exchange (AAFES)



Puerto Rico

Exchange Area	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Puerto Rico	$34,742,000	$2,832,000	$37,574,000	$32,995,000	+13.88%

Totals

	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Overseas Totals	**$1,501,259,000**	**$618,299,000**	**$2,119,560,000**	**$2,084,342,000**	**+1.69%**
Worldwide Totals	**$3,428,291,000**	**$1,331,308,000**	**$4,759,601,000**	**$4,707,430,000**	**+1.11%**

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G. (Wally) Cook, President

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Coast Guard NAFA Sales—FY 84
Continental U.S.

Coast Guard Cutters

	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs. 83
	Retail	Services & Other	Total		
Coast Guard Cutters	$390,643	$136,225	$526,868	$465,562	11.64%

NAFAs

	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
Store	Retail	Services & Other	Total		
Alameda, CA	839,683	350,441	1,190,124	1,174,608	1.32%
Alexandria, VA	35,699	81,149	116,848	103,005	13.44%
Atlantic Beach, NC	24,523	20,683	45,206	44,794	0.92%
Baltimore, MD	551,141	419,249	970,390	1,026,827	−5.50%
Boston, MA	1,152,840	312,907	1,465,747	2,061,668	−28.90%
Brooklyn, NY	1,982,882	879,711	2,862,593	2,513,294	13.90%
Buffalo, NY	181,049	19,295	200,344	212,559	−5.75%
Cape Cod, MA	2,194,665	6,358,890	8,553,555	9,293,393	−7.96%
Cape May, NJ	1,016,479	1,932,040	2,948,519	3,349,400	−11.97%
Charleston, SC	407,624	615,876	1,023,500	961,417	6.46%
Clearwater, FL	1,173,267	510,392	1,683,659	1,860,197	−9.49%
Cleveland, OH MSO	−0−	870,575	870,575	949,348	−8.30%
Cleveland, OH 9th Dist Exchange	481,738	3,178,738	3,660,476	4,038,721	−9.37%
Detroit, MI	412,542	113,924	526,466	478,341	10.06%
Elizabeth City, NC	1,403,309	430,310	1,833,619	2,131,681	−13.98%
Galena Park, TX	58,792	7,701	66,493	73,309	−9.30%
Galveston, TX	326,085	83,757	409,842	473,362	−13.42%
Gloucester City, NJ	621,098	−0−	621,098	610,874	1.67%
Governors Island, NY	3,520,925	2,380,410	5,901,335	6,654,304	−11.32%
Hampton Bay, NY	199,632	−0−	199,632	224,099	−10.92%
McKinleyville, CA	96,864	7,917	104,781	123,418	−15.10%
Mayport, FL	1,010,599	−0−	1,010,599	996,316	1.43%
Miami Beach, FL	342,173	169,929	512,102	608,722	−15.87%
Milwaukee, WI	146,781	9,065	155,846	176,110	−11.51%
Mobile (ATC), AL	1,749,939	7,845,261	9,595,200	9,860,051	−2.69%
Mobile (Base), AL	1,301,527	938,305	2,239,832	2,498,932	−10.37%
Muskegon, MI	88,942	334,690	423,632	577,167	−26.60%
New Haven, CT	3,810,641	1,367,130	5,177,744	5,290,259	−2.13%
New London, CT	652,897	−0−	652,897	563,729	15.82%
New Orleans, LA	321,436	34,245	355,701	403,631	−11.87%
North Bend, OR	250,526	155,609	406,135	406,531	−0.10%
Opa Locka, FL	2,335,063	2,460,831	4,795,894	5,021,475	−4.49%
Petaluma, CA	1,116,961	456,818	1,573,779	2,091,230	−24.74%
Port Angeles, WA	376,124	411,577	787,701	808,008	−2.51%
Portland, OR	53,460	8,520	61,980	70,499	−12.08%

Continued on next page

Coast Guard NAFA Sales—FY 84 Continental U.S.

NAFAs

Continued from previous page	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Portsmouth, VA	854,167	465,738	1,319,905	1,308,624	0.86%
St. Louis, MO	414,044	186,277	600,321	698,926	−14.11%
St. Petersburg, FL	3,234,637	3,905,257	7,139,894	7,468,767	−4.40%
San Diego, CA	73,136	17,197	90,333	112,761	−19.89%
San Pedro, CA	175,088	96,711	271,799	257,347	5.62%
Sault St. Marie, MI	153,552	29,864	183,416	185,857	−1.31%
Seattle, WA	1,256,036	420,329	1,676,365	1,611,588	4.02%
South Portland, ME	2,064,890	656,808	2,721,698	2,567,146	6.02%
Traverse City, MI	239,656	661,912	901,568	1,003,090	−10.12%
Warrenton, OR	486,206	660,742	1,146,948	1,195,921	−4.10%
Yorktown, VA	1,362,265	562,244	1,924,509	1,788,587	7.60%

Totals

	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
CONUS Totals	**$40,069,865**	**$40,941,638**	**$81,011,503**	**$85,971,744**	**−6.12%**

Coast Guard NAFA Sales—FY 84 Overseas

Alaska

Store	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Juneau, AK	800,711	190,858	991,569	1,071,730	−8.08%
Ketchikan, AK	470,680	99,579	570,259	589,609	−3.39%
Kodiak (Support Center), AK	3,441,381	1,590,852	5,032,233	4,770,451	5.20%
Sitka, AK	283,705	74,272	357,977	386,787	−8.05%
Alaska Totals	**$4,996,477**	**$1,955,561**	**$6,952,038**	**$6,818,577**	**+1.92%**

Hawaii

Store	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Barbers Point, HI	−0−	77,600	77,600	67,706	12.75%
Honolulu, HI	1,594,210	2,408,711	4,002,921	3,972,120	0.77%
Hawaii Totals	**$1,594,210**	**$2,486,311**	**$4,080,521**	**$4,039,826**	**1.00%**

Coast Guard NAFA Sales—FY 84

Italy

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Lampedusa	20,780	9,909	30,689	14,251	53.56%
Sellia Marina	15,938	–0–	15,938	–0–	100.00%
Italy Totals	**$36,718**	**$9,909**	**$62,965**	**$14,251**	**77.22%**

Puerto Rico

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Aquadilla	2,089,935	3,723,069	5,813,004	5,245,954	9.75%
San Juan	1,382,438	1,383,669	2,766,512	2,748,817	0.64%
Puerto Rico Totals	**$3,472,778**	**$5,106,738**	**$8,579,516**	**$7,994,771**	**6.82%**

Spain

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Estaritt	12,233	55	12,288	27,303	–122.19%

Turkey

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Kargabarun	7,232	–0–	7,232	6,652	8.02%

United Kingdom

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Sylt	12,806	1,438	14,189	19,653	–38.51%

Totals

	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Overseas Totals	**$10,132,454**	**$9,551,608**	**$19,684,062**	**$18,921,033**	**3.88%**
Worldwide Totals	**$50,592,962**	**$50,629,471**	**$101,222,433**	**$105,358,339**	**–4.00%**

Navy Exchange Sales—FY84

Summary of Sales by Retail Department

Department/Dept. Code	Continental U.S. $ Sales	%	Overseas $ Sales	%	Worldwide $ Sales	%
Auto Accessories/C8	22,476,714	2.9	7,213,727	2.1	29,690,442	2.7
Beverages (Beer & Soda)/A6	44,372,686	5.8	21,534,111	6.2	65,906,797	5.9
Books & Periodicals/C7	12,037,505	1.6	5,631,313	1.6	17,668,818	1.6
Boys' Wear/G2	8,503,513	1.1	2,171,078	0.6	10,674,591	1.0
Cameras & Equipment/B1	9,991,047	1.3	8,753,524	2.5	18,744,571	1.7
Candy & Confections/A1	12,006,751	1.6	4,942,133	1.4	16,948,885	1.5
Consumer Electronics & Musical Instruments/B5	45,480,720	5.9	64,935,321	18.8	110,416,041	9.9
Domestics/E4	15,699,775	2.1	6,077,125	1.8	21,776,901	2.0
Electrical Appliances/B4	20,065,099	2.6	16,451,193	4.8	36,516,292	3.3
Fabrics & Sewing Accessories/F2	–0–	0.0	2,064,356	0.6	2,064,357	0.2
Family Shoes/E7	27,048,487	3.5	6,384,668	1.8	33,433,155	3.0
Film & Accessories/A7	8,229,897	1.1	3,117,230	0.9	11,347,127	1.0
Food (Convenience Products)/A4	38,804,638	5.1	17,025,046	4.9	55,829,685	5.0
Fragrances & Cosmetics/D5	15,380,069	2.0	4,795,153	1.4	20,175,222	1.8
Furniture/B9	2,960,180	0.4	15,883,334	4.6	18,843,514	1.7
Garden Supplies & Outdoor Living/C9	23,782,327	3.1	3,916,279	1.1	27,698,606	2.5
Girls' Wear/G1	7,859,935	1.0	2,310,358	0.7	10,170,294	0.9
Hardware & Pet Supplies/C4	17,983,764	2.3	4,070,344	1.2	22,054,109	2.0
Home Furnishings & Giftware/B8	16,321,502	2.1	13,910,287	4.0	30,231,790	2.7
Household Supplies/D3	13,027,624	1.7	5,722,079	1.7	18,749,703	1.7
Housewares/B2	12,045,792	1.6	4,797,480	1.4	16,843,272	1.5
Infants' & Children's Wear/E5	10,536,996	1.4	3,790,462	1.1	14,327,459	1.3
Intimate Apparel & Accessories/E3	17,361,233	2.3	4,021,399	1.2	21,382,633	1.9
Jewelry/D2	17,706,792	2.3	11,003,345	3.2	28,710,137	2.6
Luggage & Leather Goods/C1	8,701,766	1.1	2,362,617	0.7	11,064,383	1.0
Men's Wear & Accessories/E2	60,096,123	7.8	15,427,291	4.5	75,523,414	6.8
Party Goods & Greeting Cards/C3	11,239,642	1.5	3,717,757	1.1	14,957,399	1.3
Records & Tapes/A8	16,824,022	2.2	14,594,345	4.2	31,418,368	2.8
Sporting Goods/B3	12,472,946	1.6	7,684,760	2.2	20,157,707	1.8
Stationery/C2	12,837,720	1.7	3,448,021	1.0	16,285,742	1.5
Tobacco & Smoking Accessories/A2	98,872,762	12.9	13,438,353	3.9	112,311,115	10.1
Toiletries & Drugs/D1	35,048,718	4.6	10,557,877	3.1	45,606,595	4.1
Toys & Wheel Goods/C5	17,161,926	2.2	8,504,495	2.5	25,666,422	2.3
Watches & Accessories/D4	8,848,793	1.2	3,754,601	1.1	12,603,395	1.1
Women's Ready-to-Wear/E8	25,243,472	3.3	7,297,176	2.1	32,540,649	2.9
Miscellaneous/E9	3,299,348	0.4	7,019,181	2.0	10,318,529	0.9
Department Sales Adjustments*						
All "B" Departments/B6	(22)	a	1,588,110	0.5	1,588,090	0.1
All "C" Departments/C6	783,366	0.1	134,485	a	917,852	0.1
All "D" Departments/D6	–0–	a	54,625	a	54,625	a
All "E" Departments/E6	1	a	77,664	a	77,666	a
Retail Subtotals	**$731,113,631**	**95.5%**	**$340,182,703**	**98.4%**	**$1,071,296,352**	**96.4%**
Uniforms & Accessories	34,477,674	4.5	5,625,182	1.6	40,102,856	3.6
Retail Department Totals	**$765,591,326**	**100.0%**	**$345,807,885**	**100.0%**	**$1,111,399,208**	**100.0%**

Note: Navy exchange sales for FY84 are preliminary and unaudited.

a Less than one-tenth of one percent.

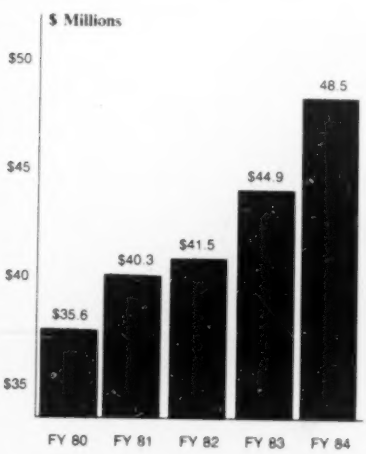
* Sales adjustments compensate for inventory and are prorated among appropriate retail category departments prior to NAVRESSO's release of final sales data.

NAVRESSO Exchange Sales—FY 84
Continental U.S.

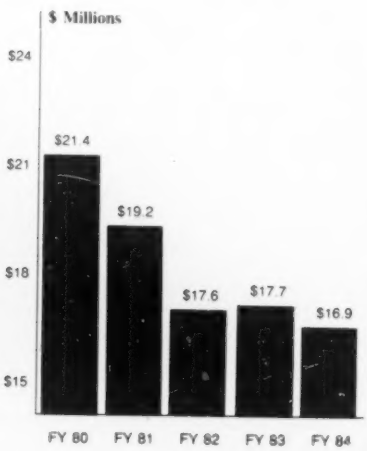
Auburn FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Bangor (NSB), WA	8,649,363	4,802,871	13,452,234	11,228,683	19.80%
Bremerton (PSNS), WA	10,043,278	3,246,863	13,290,141	13,149,819	1.07%
Coos Head (NF), OR	77,510	3,028	80,539	68,149	18.18%
Pacific Beach (NF), WA	100,401	18,793	119,194	139,793	−14.74%
Seattle (NS), WA	15,217,559	2,539,029	17,756,589	17,794,295	−0.21%
Whidbey Island (NAS), WA	14,436,615	6,282,935	20,722,550	20,262,834	2.27%
Auburn FSO Totals	**$48,524,726**	**$16,893,519**	**$65,421,247**	**$62,643,573**	**+4.43%**

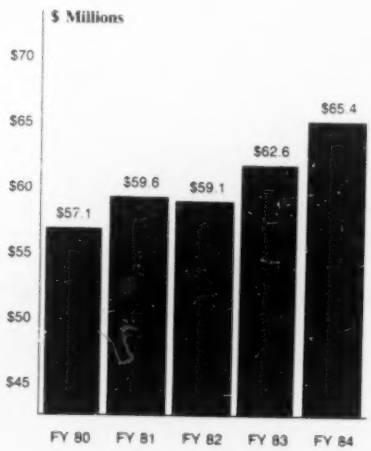
5-Year Retail Sales Summary
Auburn FSO (NAVRESSO)



5-Year Services Sales Summary
Auburn FSO (NAVRESSO)



5-Year Total Sales Summary
Auburn FSO (NAVRESSO)

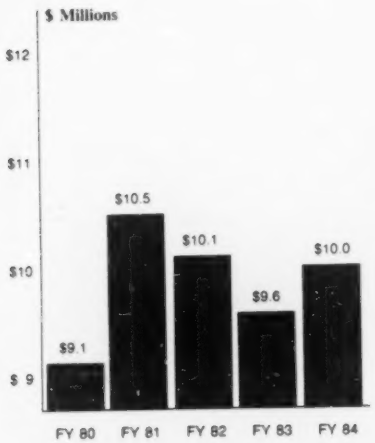


Corpus Christi Region

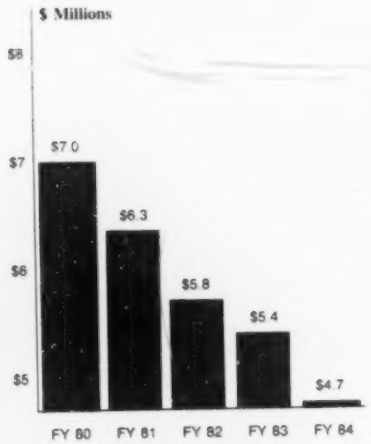
Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Beeville (NAS), TX[b]	1,523,509	1,243,873	2,767,382	2,762,896	0.16%
Corpus Christi (NAS), TX[m]	6,704,709	2,289,214	8,993,923	9,426,459	−4.59%
Kingsville (NAS), TX[b]	1,741,537	1,228,340	2,969,877	2,839,601	4.59%
Region Totals	**$9,969,755**	**$4,761,427**	**$14,731,182**	**$15,028,956**	**−1.98%**

Notes: [b]Branch Exchanges; [m]Main Exchange.

5-Year Retail Sales Summary
Corpus Christs Region (NAVRESSO)



5-Year Services Sales Summary
Corpus Christi Region (NAVRESSO)

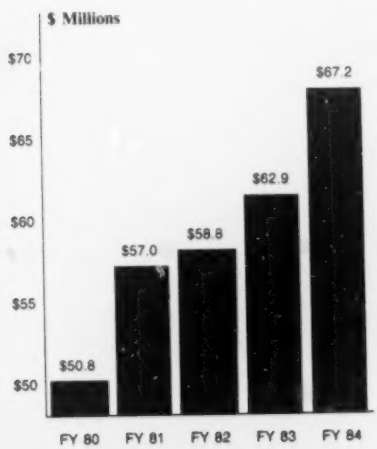


5-Year Total Sales Summary
Corpus Christs Region (NAVRESSO)

Davisville FSO

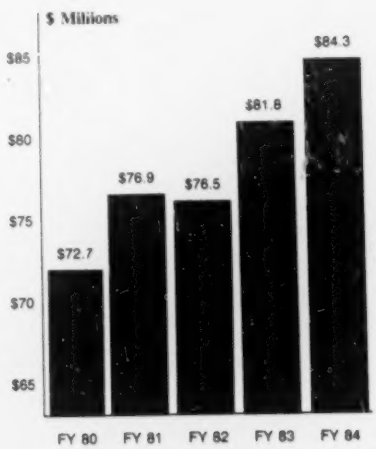
Store	FY 84 $ Sales Retail	FY 84 $ Sales Services & Other	FY 84 $ Sales Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Brooklyn (NS), NY	1,514,711	181,277	1,695,988	1,811,501	−6.38%
Brunswick (NAS), ME	7,315,691	2,169,990	9,485,682	9,493,761	−0.09%
Cutler (NCU), ME	319,740	72,438	392,178	371,478	5.57%
Mitchel Field (NHA), NY	8,424,632	1,029,578	9,454,211	9,138,877	3.45%
New London (NSB), CT	27,338,246	8,650,467	35,988,713	33,660,906	6.92%
Newport (NETC), RI	14,919,838	3,774,841	18,694,679	18,771,100	−0.41%
Portsmouth (PNS), NH	411,764	328,582	740,347	817,196	−9.40%
Scotia (NAU), NY	1,802,158	119,889	1,922,047	1,844,361	4.21%
South Weymouth (NAS), MA	4,794,174	489,505	5,283,679	5,339,880	−1.05%
Winter Harbor (NSGA), ME	416,777	223,504	640,281	577,268	10.92%
Davisville FSO Totals	**$67,257,731**	**$17,040,071**	**84,297,805**	**$81,826,328**	**+3.02%**

5-Year Retail Sales Summary
Davisville FSO (NAVRESSO)



5-Year Services Sales Summary
Davisville FSO (NAVRESSO)

5-Year Total Sales Summary
Davisville FSO (NAVRESSO)

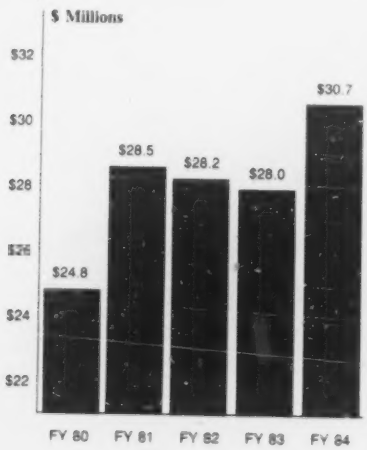


NAVRESSO Exchange Sales—FY 84

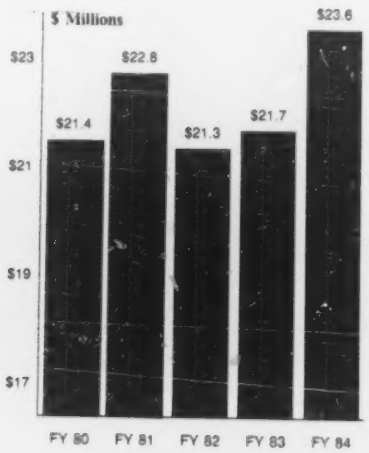
Great Lakes Region

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Crane (NWSC), IN	259,185	76,693	335,879	333,140	0.82%
Glenview (NAS), IL	1,463,365	798,798	2,262,164	2,292,064	−1.30%
Great Lakes (NRMC), IL	915,685	1,301,133	2,216,818	1,840,382	20.45%
Great Lakes (NTC), IL	28,103,425	21,422,595	49,526,020	45,245,245	9.46%
Region Totals	**$30,741,660**	**$23,599,219**	**$54,340,881**	**$49,710,831**	**+9.31%**

5-Year Retail Sales Summary
Great Lakes Region (NAVRESSO)



5-Year Services Sales Summary
Great Lakes Region (NAVRESSO)

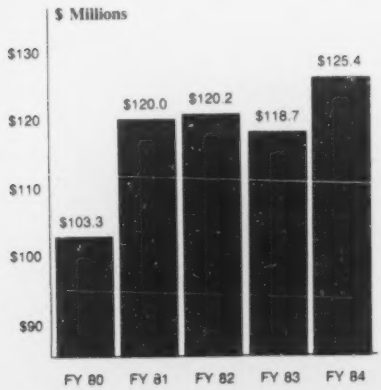


5-Year Total Sales Summary
Great Lakes Region (NAVRESSO)

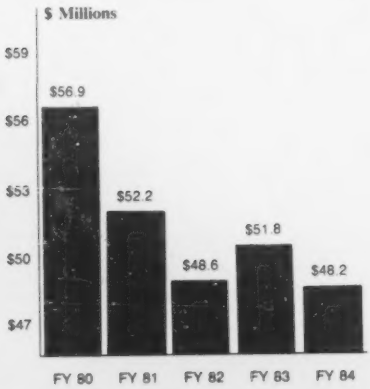
Jacksonville FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Athens (NSCS), GA	1,577,855	415,154	1,993,010	1,965,626	1.39%
Atlanta (NAS), GA	2,000,347	722,843	2,723,191	2,869,935	−5.11%
Beaufort (NH), SC	620,206	417,073	1,037,280	735,655	41.00%
Cecil Field (NAS), FL	5,750,357	4,296,425	10,046,782	10,316,201	−2.61%
Charleston (NRMC), SC	328,640	439,475	768,115	718,089	6.97%
Charleston (NS), SC	15,172,642	6,966,239	22,138,881	20,736,466	6.76%
Charleston (NWS), SC	5,468,469	2,076,507	7,544,977	6,859,021	10.00%
Jacksonville (NAS), FL	29,251,355	10,638,670	39,890,025	40,087,257	−0.49%
Key West (NAS), FL	4,248,363	2,051,554	6,299,917	6,723,270	−6.30%
Kings Bay (NSB), GA	2,171,551	1,481,162	3,652,714	3,239,556	12.75%
Mayport (NS), FL	9,572,610	4,822,760	14,395,371	14,511,390	−0.80%
Orlando (NTC), FL	49,215,226	13,844,427	63,059,653	61,743,207	2.13%
Jacksonville FSO Totals	**$125,377,621**	**$48,172,289**	**$173,549,916**	**$170,505,673**	**+1.79%**

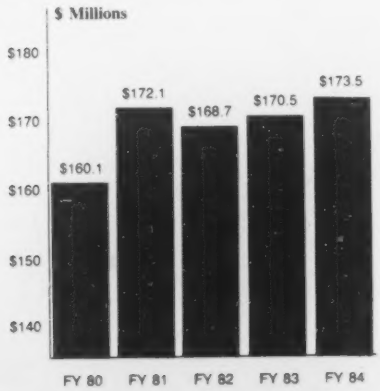
5-Year Retail Sales Summary
Jacksonville FSO (NAVRESSO)



5-Year Services Sales Summary
Jacksonville FSO (NAVRESSO)



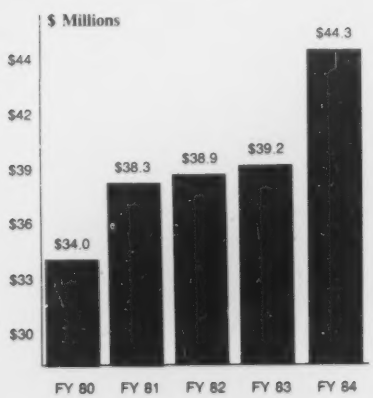
5-Year Total Sales Summary
Jacksonville FSO (NAVRESSO)



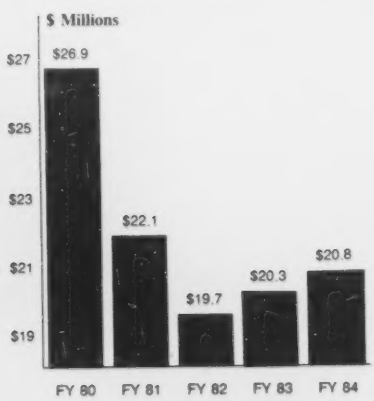
Mechanicsburg FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Annapolis (NS), MD	4,348,400	1,286,090	5,634,490	4,996,370	12.77%
Arlington (NUC), VA	1,032,477	126,739	1,159,217	−0−	0.00%
Bethesda (NMC), MD	8,293,374	4,627,227	12,920,602	11,900,924	8.57%
Colts Neck (NWS), NJ	637,292	341,247	978,540	771,381	26.86%
Dahlgren (NSWS), VA	407,101	741,189	1,148,290	1,005,002	14.26%
Indian Head (NOS), MD	333,046	247,652	580,699	603,916	−3.84%
Lakehurst (NAEC), NJ	2,752,797	799,924	3,552,721	3,673,349	−3.28%
Mechanicsburg (NSPCC), PA	684,998	27,467	712,466	616,182	15.63%
Patuxent River (NAS), MD	6,879,880	3,743,278	10,623,158	10,054,301	5.66%
Philadelphia (ASO), PA	381,533	15,523	397,056	367,803	7.95%
Philadelphia (NRMC), PA	412,884	136,151	549,036	584,446	−6.06%
Philadelphia (NS), PA	11,801,900	4,500,381	16,302,282	15,005,300	8.64%
Warminster (NADC), PA	460,614	99,567	560,182	550,013	1.85%
Washington Navy Yard (ND), DC	1,329,513	2,997,945	4,327,459	4,080,365	6.06%
Willow Grove (NAS), PA	4,566,493	1,076,976	5,643,470	5,294,960	6.58%
Mechanicsburg FSO Totals	**$44,322,302**	**$20,767,356**	**$65,089,668**	**$59,504,312**	**+9.39%**

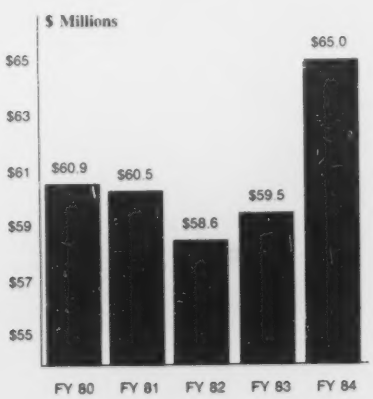
5-Year Retail Sales Summary
Mechanicsburg FSO (NAVRESSO)



5-Year Services Sales Summary
Mechanicsburg FSO (NAVRESSO)



5-Year Total Sales Summary
Mechanicsburg FSO (NAVRESSO)

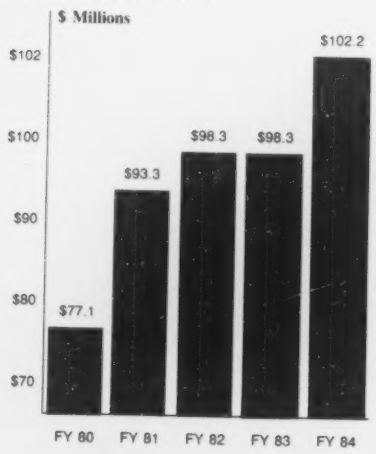


NAVRESSO Exchange Sales—FY 84

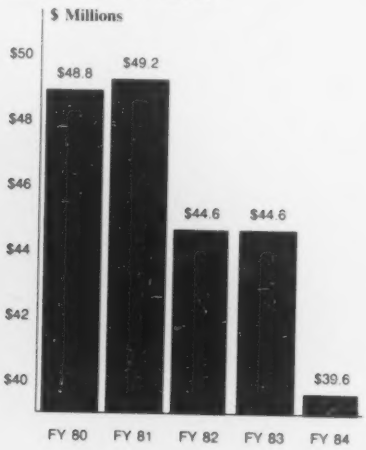
Norfolk FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Chesapeake (NSGA), VA	389,483	245,215	634,698	681,574	−6.88%
Dam Neck (FCTC), VA	2,004,966	2,726,391	4,731,358	4,745,818	−0.30%
Little Creek (NAB), VA	34,443,440	7,770,670	42,214,110	42,883,203	−1.56%
Norfolk (AFHSA), VA	1,096,249	1,254,923	2,351,172	2,472,995	−4.93%
Norfolk (NB), VA	36,924,314	16,392,383	53,316,698	54,799,521	−2.71%
Norfolk (NUMOC), VA	1,720,771	−0−	1,720,771	494,107	248.26%
Oceana (NAS), VA	14,735,539	6,091,540	20,827,079	20,755,923	0.34%
Portsmouth (NNS), VA	7,804,351	2,108,310	9,912,662	9,908,598	0.04%
Portsmouth (NRMC), VA	1,498,536	1,914,135	3,412,671	3,523,190	−3.14%
Sugar Grove (NRS), WV	147,443	51,228	198,672	169,341	17.32%
Yorktown (NWS), VA	1,406,930	1,068,646	2,475,576	2,404,654	2.95%
Norfolk FSO Totals	**$102,172,022**	**$39,623,441**	**$141,795,467**	**$142,838,924**	**−0.73%**

5-Year Retail Sales Summary
Norfolk FSO (NAVRESSO)



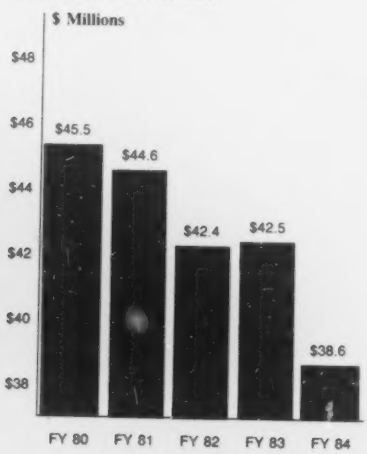
5-Year Services Sales Summary
Norfolk FSO (NAVRESSO)



5-Year Total Sales Summary
Norfolk FSO (NAVRESSO)

5-Year Retail Sales Summary
Oakland FSO (NAVRESSO)

5-Year Services Sales Summary
Oakland FSO (NAVRESSO)



5-Year Total Sales Summary
Oakland FSO (NAVRESSO)

NAVRESSO Exchange Sales—FY 84

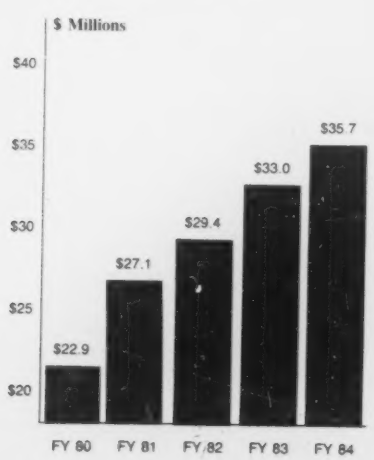
Oakland FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Alameda (NAS), CA	16,771,149	6,840,625	23,611,775	23,895,774	−1.19%
Concord (NWS), CA	812,367	523,049	1,335,416	1,395,761	−4.32%
Fallon (NAS), NV	1,664,319	1,112,714	2,777,033	2,507,130	10.77%
Ferndale (NF), CA	155,006	98,387	253,394	286,749	−11.63%
Lemoore (NAS), CA	8,587,870	6,543,473	15,131,344	14,242,155	6.24%
Mare Island (NS), CA	7,325,292	5,323,693	12,648,986	12,625,416	0.19%
Moffett Field (NAS), CA	20,031,245	7,802,640	27,833,885	28,824,350	−3.44%
Monterey (NPGS), CA	6,964,903	3,263,320	10,228,224	10,029,882	1.98%
Novato (DoDHF), CA	5,414,770	2,100,068	7,514,838	7,551,932	−0.49%
Oakland (NRMC), CA	2,402,863	1,562,388	3,965,252	4,485,782	−11.60%
Oakland (NSC), CA	397,973	447,058	845,031	805,458	4.91%
Skaggs Island (NSGA), CA	128,508	146,969	275,478	264,490	4.15%
Stockton (NCS), CA	1,339,257	454,155	1,793,413	1,840,002	−2.53%
Treasure Island (NSA), CA	3,995,824	2,415,045	6,410,869	6,515,226	−1.60%
Oakland FSO Totals	**$75,991,346**	**$38,633,584**	**$114,624,938**	**$115,270,107**	**−0.56%**

Pensacola Region

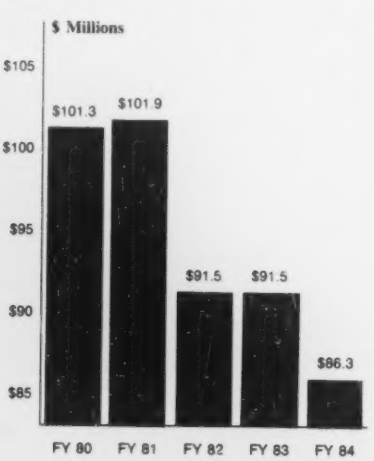
Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Gulfport (NCBC), MS	4,506,518	2,180,506	6,687,024	6,214,332	7.07%
Panama City (NCSC), FL	1,210,394	425,241	1,635,636	1,618,266	1.06%
Pascagoula (SSCR), MS	479,161	49,820	528,981	559,268	−5.73%
Pensacola (NAS), FL	25,484,926	6,722,131	32,207,057	30,557,091	5.12%
Pensacola (NTTC), FL	1,728,283	1,557,858	3,286,141	3,225,545	1.84%
Whiting Field (NAS),FL	2,337,471	1,649,825	3,987,296	4,188,656	−5.05%
Region Totals	**$35,746,753**	**$12,585,381**	**$48,332,135**	**$46,363,158**	**+4.25%**

5-Year Retail Sales Summary
Pensacola Region (NAVRESSO)



5-Year Total Sales Summary
Pensacola Region (NAVRESSO)

5-Year Services Sales Summary
San Diego FSO (NAVRESSO)

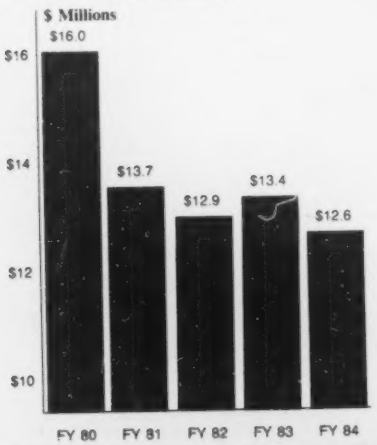


NAVRESSO Exchange Sales—FY 84

San Diego FSO

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
China Lake (NWC), CA	2,487,790	1,999,076	4,486,867	4,161,389	7.82%
Coronado (NAB),CA	3,609,550	3,211,677	6,821,228	6,354,198	7.35%
El Centro (NAF), C	736,716	475,680	1,212,396	1,224,416	−0.98%
Imperial Beach (NLF), CA	6,145,126	2,020,662	8,165,788	7,910,425	3.23%
Long Beach (NS),CA	22,393,113	9,112,958	31,506,072	31,019,259	1.57%
Miramar (NAS), CA	35,093,737	12,717,554	47,811,291	43,701,247	9.40%
North Island (NAS), CA	15,717,255	11,539,974	27,257,230	26,658,977	2.24%
Point Mugu (NAS), CA	3,840,910	3,115,884	6,956,794	7,497,863	−7.22%
Port Hueneme (NCBC), CA	14,162,721	6,025,253	20,187,974	19,252,435	4.86%
San Clemente Island (NALF),CA	159,473	35,705	195,179	195,766	−0.30%
San Diego (NH),CA	3,637,786	2,478,454	6,116,241	6,752,278	−9.42%
San Diego (NS), CA	51,429,078	16,188,260	67,617,338	62,179,853	8.74%
San Diego (NSSF), CA	1,337,537	1,648,937	3,986,474	2,560,199	55.71%
San Diego (NTC), CA	18,271,383	15,725,793	33,997,176	31,567,387	7.70%
San Diego FSO Totals	**$179,022,175**	**$86,295,867**	**$266,318,048**	**$251,035,692**	**+5.74%**

5-Year Services Sales Summary
Pensacola Region (NAVRESSO)



5-Year Retail Sales Summary
San Diego FSO (NAVRESSO)

5-Year Total Sales Summary
San Diego FSO (NAVRESSO)

Stand Alone Exchanges

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Dallas (NAS), TX	8,496,485	1,818,211	10,314,696	9,616,640	7.26%
Meridian (NAS), MS	4,962,197	2,726,821	7,689,019	7,074,162	8.69%
Millington (Memphis NAS), TN	21,836,803	10,938,813	32,775,616	30,085,605	8.94%
New Orleans (NSA), LA	8,496,314	2,633,001	11,129,315	10,368,391	7.34%
Staten Island (NUS), NY	177,938	−0−	177,938	340,180	−47.69%

Totals

	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
CONUS Totals	**$763,095,828**	**$326,489,000**	**$1,090,587,871**	**$1,052,212,532**	**+3.65%**

NAVRESSO Exchange Sales—FY 84
Overseas

Alaska

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Adak (NS)[m]	8,196,563	2,858,587	11,055,151	10,015,536	10.38%

Australia

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Exmouth (NCS)[m]	1,311,029	286,573	1,597,603	1,439,901	10.95%

Bermuda

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Bermuda (NAS)[m]	6,648,273	1,828,192	8,476,466	7,940,444	6.75%

Crete

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Souda Bay (NAS), Crete[b]	470,716	95,401	566,117	525,510	7.73%

Cuba

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Guantanamo Bay (NS)[m]	11,319,436	4,994,733	16,314,170	16,572,547	−1.56%

Notes: [m]Main Exchange, [b]Branch Exchange

Hawaii

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Barbers Point (NAS)[m]	15,416,243	7,286,786	22,703,030	23,362,135	−2.82%
Honolulu (NCA)[b]	870,300	560,718	1,431,019	1,374,501	4.11%
Kekaha (PMRF)[b]	1,600,181	241,327	1,841,509	1,693,363	8.75%
Lualualei (NM)[b]	538,379	297,382	835,761	847,901	−1.43%
Pearl Harbor (NB)[m]	70,454,209	17,550,466	88,004,676	85,594,193	2.82%
Hawaii Totals	**$88,879,312**	**$25,936,679**	**$114,815,995**	**$112,872,093**	**+1.72%**

Notes: [m]Main Exchange, [b]Branch Exchange

NAVRESSO Exchange Sales—FY 84

Iceland

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Keflavik (NS)[m]	11,201,675	3,712,258	14,913,934	14,677,413	1.61%

Notes: [m]Main Exchange; [b]Branch Exchange

Italy

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Gaeta (NSAD)[b]	954,304	586,499	1,540,804	1,524,096	1.10%
Naples (NAS)[m]	22,046,924	9,059,732	31,106,657	32,905,202	−5.47%
Sardinia (NSO)/La Maddalena[b]	1,615,650	286,565	1,902,215	1,972,296	−3.55%
Sigonella (NAF)/Sicily[b]	11,595,680	4,258,252	15,853,933	14,095,400	12.48%
Italy Totals	**$36,212,558**	**$14,191,048**	**$50,403,609**	**$50,496,994**	**−0.18%**

Notes: [m]Main Exchange; [b]Branch Exchange

Japan

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Atsugi (NAF)[m]	8,870,526	3,389,400	12,259,926	12,203,822	0.46%
Sanno Hotel (NEF)[b]	2,115,218	227,583	2,342,802	2,048,168	14.39%
Sasebo (NOF)[b]	3,393,320	718,565	411,886	6,971,690	−94.09%
Yokosuka (FA)[m]	37,498,976	12,083,307	49,582,283	44,205,285	12.16%
Japan Totals	**$51,878,040**	**$16,418,855**	**$64,596,897**	**$65,428,965**	**−1.27%**

Notes: [m]Main Exchange; [b]Branch Exchange

Marianas Islands

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Guam (NS)[m]	37,085,477	10,138,482	47,223,960	45,182,078	4.52%

Notes: [m]Main Exchange; [b]Branch Exchange

Newfoundland

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Argentia (NF)[m]	970,154	301,348	1,271,503	1,408,010	−9.70%

Notes: [m]Main Exchange; [b]Branch Exchange

NAVRESSO Exchange Sales—FY 84

New Zealand

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Christchurch (NSFAD)[m]	543,522	20,792	564,314	672,453	−16.08%

Notes: [m]Main Exchange, [b]Branch Exchange

Philippines

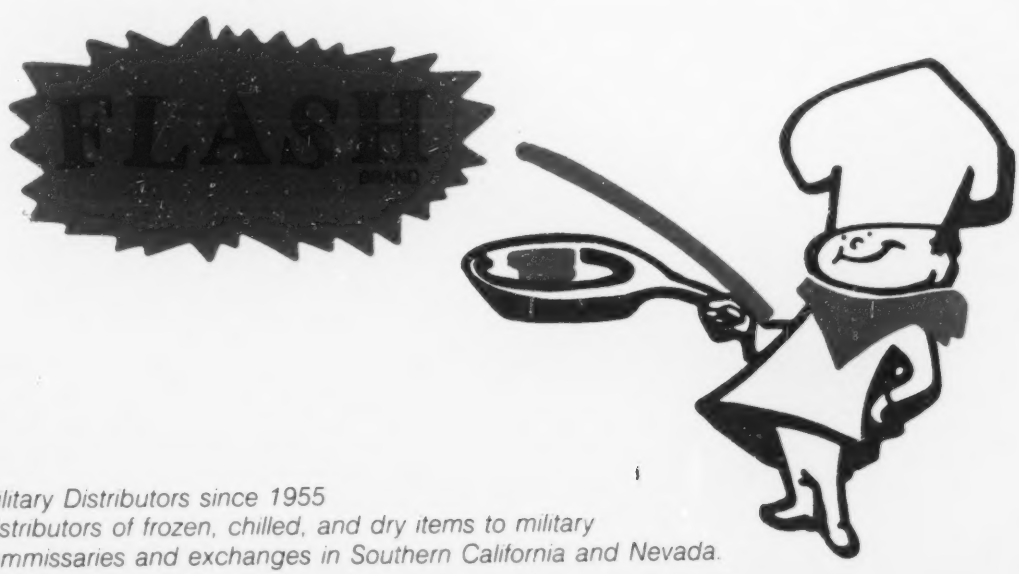
Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Cubi Point (NAS)[b]	5,926,180	3,027,945	8,954,126	8,695,619	2.97%
San Miguel (NCS)[b]	1,912,592	721,750	2,634,343	2,623,898	0.40%
Subic Bay (NS)[m]	34,158,603	10,889,675	45,048,278	42,935,830	4.92%
Philippines Totals	**$41,997,375**	**$14,639,370**	**$56,636,747**	**$54,255,347**	**+4.39%**

Notes: [m]Main Exchange, [b]Branch Exchange

Portugal

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Lisbon (NSUH)[b]	659,103	−0−	659,103	581,641	13.32%

Notes: [m]Main Exchange, [b]Branch Exchange



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NAVRESSO Exchange Sales—FY 84

Puerto Rico

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Roosevelt Roads (NS)[m]	16,351,811	5,163,960	21,515,772	20,703,825	3.92%
Sabana Seca (NSGA)[b]	3,072,294	309,153	3,381,447	3,206,569	5.45%
Puerto Rico Totals	**$19,424,105**	**$5,473,113**	**$24,897,219**	**$23,910,394**	**+4.13%**

Notes: [m]Main Exchange, [b]Branch Exchange

Spain

	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Rota (NS)[m]	$18,665,512	$6,941,137	$25,606,650	$25,736,352	**−0.50%**

Notes: [m]Main Exchange, [b]Branch Exchange

United Kingdom

Store & Country	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Brawdy (NF), Wales	667,652	232,402	900,055	1,026,652	−12.33%
Edzell (NSGA), Scotland	2,067,499	497,351	2,564,851	2,563,095	0.07%
Holy Loch (NA), Scotland	3,137,589	342,484	3,480,074	3,457,399	0.66%
London (NAUK), England	1,292,101	165,077	1,457,179	1,708,753	−14.72%
Machrihanish (NAWF), Scotland	215,319	22,394	237,714	276,156	−13.92%
St. Mawgan (NAWF), England	309,865	112,806	422,672	452,339	−6.56%
Thurso (NCS), Scotland	492,054	59,063	551,117	572,737	−3.77%
West Ruislip, London (NA), England	2,162,954	303,403	2,466,357	2,456,445	0.40%
United Kingdom Totals	**$10,345,033**	**$1,734,980**	**$12,080,019**	**$12,513,576**	**−3.46%**

West Indies

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Antigua (NF)[b]	662,305	128,271	790,577	827,076	−4.41%

Note: [b]Branch Exchange

Totals

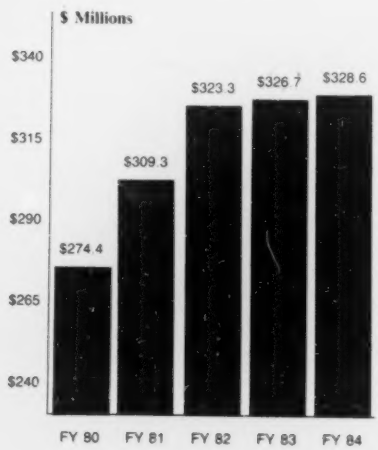
	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Overseas Totals	**$318,524,171**	**$99,636,333**	**$414,460,527**	**$408,562,392**	**+1.44%**
Worldwide Totals	**$1,081,619,999**	**$426,125,333**	**$1,505,048,398**	**$1,460,774,924**	**+3.03%**

Marine Corps Exchange Sales—FY 84

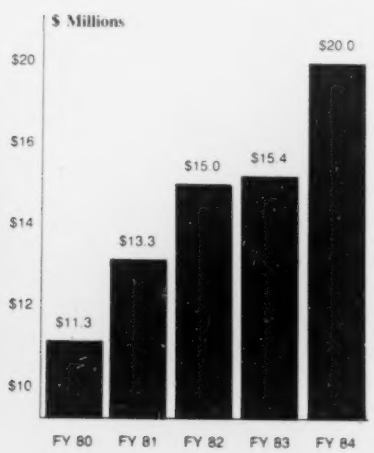
Continental U.S.

Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Albany, GA	4,179,485	237,361	4,416,846	4,617,609	−4.35%
Barstow, CA	2,253,728	372,579	2,626,307	2,368,338	10.89%
Camp Elmore, VA	5,195,673	148,381	5,344,054	5,095,477	4.88%
Camp Lejeune, NC	63,610,128	1,555,663	65,165,791	64,520,217	1.00%
Camp Pendleton, CA	61,873,984	7,804,862	69,678,846	71,108,844	−2.01%
Cherry Point, NC	20,960,756	1,180,785	22,141,541	20,084,222	10.24%
El Toro, CA	43,731,608	856,949	44,588,557	42,011,036	6.14%
Henderson Hall, VA	11,336,047	449,767	11,785,814	12,472,983	−5.51%
Parris Island, SC	23,503,200	1,527,351	25,030,551	22,282,101	12.33%
Quantico, VA	34,694,099	1,595,197	36,298,296	34,282,061	5.86%
San Diego, CA	29,677,864	2,367,878	32,045,742	33,960,374	−5.64%
Twentynine Palms, CA	20,225,749	901,192	21,126,941	21,110,614	0.08%
Yuma, AZ	7,370,080	1,086,625	8,456,705	8,157,011	3.67%
CONUS Totals	**$328,612,401**	**$20,084,590**	**$348,696,991**	**$342,070,887**	**+1.94%**

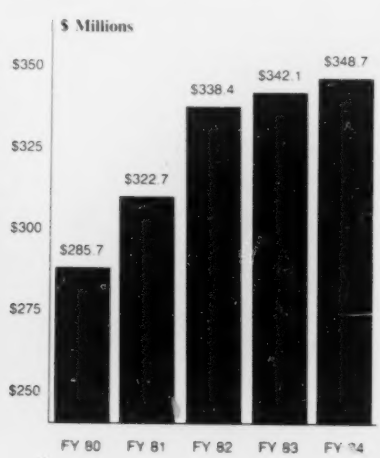
5-Year Retail Sales Summary
Marine Corps CONUS Exchanges



5-Year Services Sales Summary
Marine Corps CONUS Exchanges



5-Year Total Sales Summary
Marine Corps CONUS Exchanges

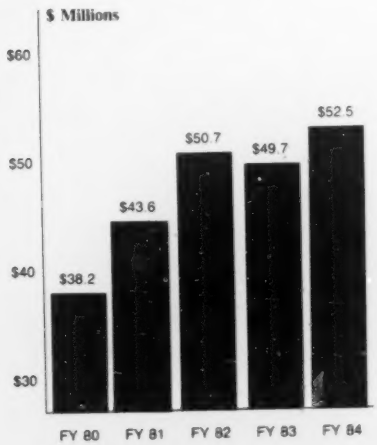


Overseas

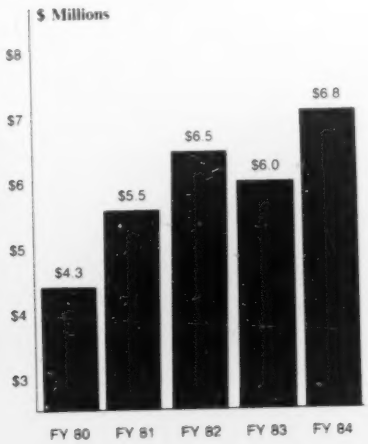
Store	FY 84 $ Sales Retail	Services & Other	Total	Total $ Sales FY83	Total Sales % Change 84 vs 83
Guantanamo Bay, Cuba	4,929,327	164,863	5,094,190	4,892,756	4.12%
Iwakuni, Japan	12,151,310	4,083,661	16,234,971	15,073,515	7.71%
Kaneohe Bay, HI	31,754,095	2,290,725	34,044,820	32,568,956	4.53%
Rodman (Canal Zone), Panama	3,661,320	276,139	3,937,459	3,178,793	23.87%

Marine Corps Exchange Sales—FY 84

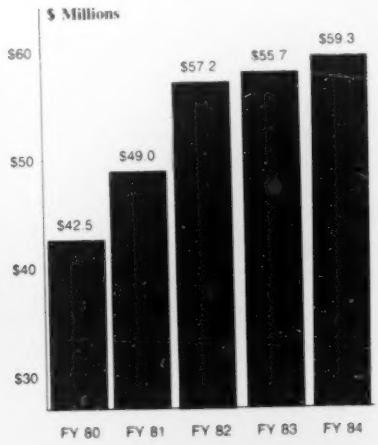
5-Year Retail Sales Summary
Marine Corps Overseas Exchanges



5-Year Services Sales Summary
Marine Corps Overseas Exchanges

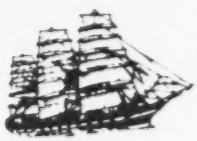


5-Year Total Sales Summary
Marine Corps Overseas Exchanges



Totals

	FY 84 $ Sales			Total $ Sales FY83	Total Sales % Change 84 vs 83
	Retail	Services & Other	Total		
Overseas Totals	52,496,052	6,815,388	59,311,440	55,714,020	6.46%
Worldwide Totals	$381,108,453	$26,899,978	$408,008,431	$397,784,907	+2.57%



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